



Bioterrorism Readiness Suite™ 3.0

User Guide

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1 Introduction

Welcome to the BTRS 3.0 User Guide!

This chapter provides you with information about:

- BTRS, including what's new for this version
- How this guide has been put together
- Using this guide and the BTRS portal

What Is Bioterrorism Readiness Suite?

Bioterrorism Readiness Suite™ (BTRS) serves as a single, central point of log-on and access for finding, creating, and sharing information through a browser-based interface. If you have access to the Internet, you can access BTRS' portal content and collaboration areas, links to resources and applications, alerts, notification functions, and the role-based directory. Like any Web site, you simply click on buttons and links to access content and perform functions.

BTRS enables you to:

- Send alerts to and receive alerts from other users within your health area network (HAN)
- Securely share and collaborate on documents
- Locate contact information for other users within your HAN
- Read your HAN's latest news and announcements

What's New in This Version?

BTRS 3.0 includes the following additional features and improvements over BTRS 2.3a:

- *Single confirmation from any location* — When you confirm an alert via your phone, e-mail, or the BTRS portal, BTRS automatically stops all further attempts to contact you
- *Alert confirmation time* — On the *Alert Details* screen, you can now view the confirmation time for each user to whom you sent an alert
- *Work e-mail only alert* — In addition to sending alerts to fax numbers only, or through each user's alerting profile, you can now send alerts to each user's designated work e-mail address

- *Additional options for selecting roles to alert* — On the *Send New Alert* screen, you can now include with a single click all roles within an Organizational Unit (OU), or all roles within an OU and all its sub-OUs

About This Guide

To make the learning process more efficient for you, information in this guide is presented in a format different from previous versions of BTRS. The organization of the book helps you easily gain access to what you need, and then move on with your job.

How This Book Has Changed

We realize that you are under a lot of pressure to learn and use BTRS right away. You may even have another process or program in place, so this book needs to be a valuable resource for you.

To make this book useful for you, we made the following changes:

- Organized the information in the guide by the type of task you might perform, rather than by where it is located in the portal
- Kept procedures short and focused so that you can easily remember them, and later build on them
- Made tasks easy to find through a detailed index, glossary, and easy-to-find headings
- Moved the technical information and setup processes into a different book

Deciding Which Book to Use

We decided that the best way to organize and format the documentation was to divide the information into two books— a *User Guide* and an *Administrator Guide*. While both books provide step-by-step instructions, the focus of each is directed at accomplishing different types of tasks.

The *User Guide* is aimed at the day-to-day user operations working through the BTRS portal to collaborate on and post documents, and to send and receive alerts. The *User Guide* contains an overview of BTRS, provides descriptions of its functionality, and shows you how to accomplish specific tasks.

The *Administrator Guide* focuses on more advanced and technical operations, including:

- Setting up user accounts and permissions
- Managing portal content, folders, documents, and discussions
- Generating reports

Standards and Conventions Used in This Guide

The *User* and *Administrator Guides* use several conventions to help make accessing information easy and efficient. These conventions include:

- Standard user-friendly terminology
- Step-by-step instructions for completing processes
- Notes, tips, and cautions for using the BTRS portal
- A glossary of terms and an index for easy information lookup

Standard Terminology

This section describes both the technical and common terms used in these guides. Wherever possible, we have attempted to use familiar language that accurately reflects the functions it represents.

Microsoft® Technology Terminology

The BTRS system shares many terms with the product Microsoft® SharePoint Portal Server, as the SharePoint® product has been used to create the portal environment in which you'll be working. Although these terms may be unfamiliar to you, they represent elements of Internet browsers and windows that you likely already recognize. In addition to the following terms, please see the Glossary for additional definitions.

The following table “translates” some of the more technical terms into everyday language:

Microsoft® or technical term	Definition	What this means in BTRS
Dashboard	<p>A page on a dashboard site. Each dashboard contains a collection of Web parts in a modular view that can be presented to users in a Web browser.</p> <p>Microsoft developed the term “Digital Dashboard” to reflect different areas and components of the page, similar to that of a car’s dashboard.</p>	<p>This term is used to represent two things:</p> <ul style="list-style-type: none"> • The menu of choices you can select from on the Web page to access another area of the portal. Physically, this bar appears near the top of each page in the BTRS portal. This guide also refers to the “dashboard” as the “BTRS navigation bar.” • The page of the portal you are viewing or accessing, such as the <i>Document Library</i> or <i>Directory</i> dashboard. This guide also refers to this definition as “page” or “Web page.”

Microsoft® or technical term	Definition	What this means in BTRS
Dashboard site	A Web site created by using Digital Dashboard technology. The dashboard site contains a number of pages, or dashboards, and includes customization pages and custom Web part forms. The dashboard site is used to distribute information to workspace users through a Web browser.	The entire Web site or portal. This guide also refers to “dashboard site” as “portal.”
Portal	A Web site considered as an entry point to other Web sites, often by being or providing access to a search engine.	Rather than representing an entry point, the entire Web site, or all the dashboards put together. The BTRS portal provides you with access to other users’ contact information, important documents and news, and alerts. This guide uses “portal” as the primary term to define how BTRS functions.
Web Part	A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework.	A section of a Web page containing information organized by function or type, such the Announcements section on the home page, or document folders. This guide also refers to “Web part” as “section” or “area.”
Workspace	An organized collection of documents, content sources, management folders, categories, document profiles, subscriptions, and discussions. It provides a central location to organize, manage, and publish content.	The entire Web site or portal. This guide also refers to “workspace” as “portal.”

Common Actions Terminology

Both guides use common terms for actions and maneuvers you might perform while using BTRS. If you are new to using Microsoft® Windows® or a mouse, these terms may seem unfamiliar to you, but as you become more familiar with the Microsoft® Windows® environment, you can quickly become a skilled user.

The following table provides instructions on how to perform the most common actions.

Term	Action
Click	Point to the item you want, and then quickly press and release the left mouse button.
Expand	In the tree view, click the + (plus sign) next to the item.
Open	Point to the item you want, and then quickly press and release the left mouse button twice (also referred to as “double-click”).
Point	Move the mouse until the mouse pointer is positioned over (pointing to) the item you want (also referred to as “roll over”).
Right-click	Point to the item you want, and then quickly press and release the right mouse button.
Scroll	Click the scroll box in the vertical or horizontal scroll bar and drag the scroll box to see different portions of the screen that are not currently visible. Scrolling only changes what is displayed.
Select	<p>Click the item you want. A selected item usually appears in a different color or with a frame around it to indicate that it is selected.</p> <p>To select multiple items, press CTRL or SHIFT while you click. To deselect one or more items, press CTRL or SHIFT and click the item again.</p>

Step-by Step Instructions

Each time you need to complete an operation using BTRS, we provide easy-to-follow instructions to walk you through your task. Each set of instructions has a step title that describes what the task can help you do. The steps needed to perform the task are numbered in sequence.

The following table describes the different formatting conventions you might encounter when you follow the step-by-step instructions in either book.

Formatting Convention	Description
Triangular bullet	Identifies a step-by-step instruction to complete a task. The step title occurs after the triangular bullet and the steps are listed in sequence below the step title.
SMALL CAPS	Identifies a keyboard action. Keys can be used alone, in combinations, or in sequences. For example, CTRL + P means to hold down the CTRL key while pressing P .
ALL CAPS	Identifies a particular URL or path name.
Bold type	Identifies the name of a BTRS button, field, list, or menu item in a step-by-step instruction.
<i>Italics type</i>	Identifies the name of a window, screen, dialog box, or form.
Courier type	Identifies specific text for you to type in a field or on a screen.

Note, Tip, and Caution Boxes

Throughout both the *User* and *Administrator Guides* you'll find information in special boxes called Note, Tip, and Caution. Margin icons are displayed next to this information that can help make you a smarter and more effective BTRS user.



Note - This information adds to or further explains a topic, to help you become more familiar with how BTRS works.



Tip - These are hints and shortcuts that can help increase your productivity as a BTRS user.



Caution - We tell you the dos and don'ts of working with BTRS to help you avoid damaging files or losing data. Often this information is essential to the completion of the task on which you are working.

Understanding Page Elements in the BTRS Portal

The BTRS system has been designed for easy navigation throughout the portal. While each page in the BTRS portal contains specific information and instructions, the layout of the page remains constant so that you may become familiar with the portal in a short period of time.

This section identifies some of the elements you'll see throughout the portal, and how each functions.

1 — File Edit View Favorites Tools Help

2 — Address <https://yourhan.org> Go

3 — **VirtualAlert** Home Innovative Solutions for Public Health & Safety Help

4 — Home Search Categories Document Library Subscriptions Alerts Directory My Profile BTRS Admin Logoff

5 — Search This site for Go Advanced search

Active Alerts ? ↕
for Brooke Manly

Alert Time	Sent From	Subject	Priority
8/25/2004 10:10:16 AM	Chris Edwards	Potential Chemical Release	Medium
8/25/2004 10:14:10 AM	Harriet Oldenburg	Preparation for Chemical Release Investigation	Low

Categories

- Bioterrorism
- BTRS Training
- Communicable Diseases
- Health Advisories
- Response Plans

Quick Links

- Send New Alert
- NACCHO Web site
- Dept. of Homeland Security
- CDC Web site
- Using Quick Links
- Using Search

Checked Out to You

Checked Out

News

Estimating Time and Size of Bioterror Attack
In the event of a bioterror attack, rapidly estimating the size and time of attack enables short-run forecasts of the number of persons who will be symptomatic and require medical care.

Lightning—The Underrated Killer
Few people really understand the dangers of lightning. Many people don't act promptly to protect their lives, property and the lives of others because they don't understand all the dangers associated with thunderstorms and lightning. The first step in solving this problem is to educate people so that they become aware of the behavior that puts them at risk of being struck by lightning, and to let them know what they can do to reduce that risk.

Hot Weather Bulletin for Adult Care Facility Owners and Managers
This bulletin is being sent to you as guidance on handling heat-related illnesses, and how to prepare for the hot summer months.

Welcome to Virtual Alert BTRS
Provides an introduction to using the Virtual Alert BTRS dashboard site

Using News
Provides information on how to configure the News Web Part.

Subscription Summary
You do not have any subscriptions.

Announcements

First Responder - Basic Course Available
Register online for the upcoming FIRST RESPONDER - BASIC training course offered by the OEMS.

Webcast - Public Health Training Network
Register online for this upcoming webcast. Topics include: Epidemiologic clues that might suggest the covert release of a chemical agent; public health strategies for responding to the release of a chemical agent; and reporting requirements when a chemical release is suspected. Click the link for time and date.

Using Announcements

No matching documents were found



Local intranet

Elements of the Home Page

Using this example of the BTRS portal home page, look for the following standard elements:

Number	Description
1	The browser window's Menu bar and Standard Buttons toolbar (you may choose to view any or all of Internet Explorer's toolbars). Use these menus and buttons to print pages, open and close windows, and move back and forth between Web pages.
2	The browser window's Address bar. You can type the URL of your portal here, or view a list of recently-visited pages.
3	The BTRS portal title bar. This area may display your HAN's custom logo or other graphics, and displays the name of the page you are currently viewing.
4	The BTRS navigation bar. You can click these links to visit other areas of the portal. The area you are currently viewing is displayed on the navigation bar in a different color.
5	The BTRS search bar. This section enables you to search in either simple or advanced mode for items in the portal using keywords, author name, date, file name, or title.

In addition, the following graphics appear on many BTRS pages:

Graphic	Description
	Click this graphic to display online help files for this page.
	Click this graphic to refresh the information displayed on the page.

2

Getting Started

Using the BTRS system is as easy as accessing the Internet. The BTRS portal is like any other Web site; once you access it, you can easily move about to view news, announcements, and alerts, documents, and other items posted for your organization's use.

Before you get started using BTRS, take a moment to learn more about how BTRS security is set up. The BTRS system is used by many types of users, including those who create and manage user accounts, those who post and collaborate on documents, and those who use BTRS only to receive alerts. Each set of users may have different levels of access within the portal. If you work with documents in the Document Library, you may also have various levels of permission within folders and documents, based on whether you create, edit, or read document content, or if you must approve or have your document approved before it can be posted.

When you're ready, log in to BTRS, and begin your adventures in the BTRS portal on the home page, which serves as the central area and starting point for many of the step-by-step instructions in this guide.

If you get stuck and cannot find the answer to a question either in this guide, the *Administrator Guide*, or in the online help files, contact your organization's BTRS administrator.

Understanding Types of Users and Roles

The BTRS system uses a combination of permissions to create a secure environment within the portal. These permissions are assigned through different types of user licenses and application rights, and Document Library permissions, which may vary from user to user.

If you are unsure what license and permissions you have been assigned, check with your BTRS administrator.

Types of User Licenses

Each BTRS user is assigned a particular type of user license when his or her account is created. Your BTRS administrator determines which license you receive – either BTRS Administration, BTRS Collaboration, or Alerting level.

The following table shows the kinds of functions you can perform with each license:

What you can do	BTRS Administration	BTRS Collaboration	Alerting Level
Update your user profile	X	X	X
Update another user's profile	X		
Receive alerts	X	X	X
Send alerts	X	X	
Cancel alerts	X	X	
Read information and documents posted on the home page	X	X	
Use document collaboration tools (discuss and check-in/out or publish documents)	X	X	
View the role-based directory	X	X	X
Manage users, roles, role groups, and folders	X		

Roles, Role Groups, and Organizational Units

In BTRS, each user is assigned to one or more roles, and these roles may be assigned to one or more role groups and Organizational Units (OU). This enables you to quickly alert users by the function(s) they perform, rather than search for and select each individual who needs to receive an alert, saving valuable time in emergencies. In addition, security and permissions in BTRS are often assigned to roles or role groups, rather than to individual users, for easy organization and maintenance.

The following table briefly describes what roles, role groups, and OUs are, and how they function in BTRS.

This group	Denotes this
User	An individual user in BTRS (e.g., Peg Simpson)
Role	The function that one or more users perform (e.g. Peg Simpson and Jack Underhill both are assigned to the role Springfield Public Health Officers)

For more information about what roles, role groups, and OUs are, see the *Administrator Guide*.

This group	Denotes this
Organizational Unit	<p>A way to organize one or more roles that fall under a single jurisdiction, or that work as a team (e.g., Epidemiologists, HAN Coordinators, and Emergency Services Coordinators who all work for Hudson County)</p> <p>For organizational purposes, this unit is often created to group roles working for the same organization or in the same area</p>
Role Group	<p>Several roles that can be assigned or collected into a single group (e.g., All workers in all roles in the city of Springfield, or all California HAN Coordinators)</p> <p>For alerting and security purposes, this unit is created to group roles in similar job functions</p>

Types of User Permissions

In addition to user licenses, BTRS administrators can also assign various security permission levels to each user account. These permissions can be assigned either to your role or role group, or to a particular folder in the Document Library. Therefore, when you use the BTRS portal, you may be able to see and access areas and items that other users cannot, and vice versa.

Document Library Permissions

If you have either a BTRS Collaboration or BTRS Administration license, you can view and access the Document Library and subscriptions sections of the BTRS portal. Users with Alerting level licenses do not see these links on the BTRS navigation bar.

For more information about permission levels in the Document Library section of the BTRS portal, see “Understanding Document Library Permission Levels” in Chapter 4, page 45.

Role-based Permissions

Permissions assigned to your role can include the ability to:

- Alert users in other roles and receive alerts from other users
- Belong to one or more role groups
- Assign certain application rights
- Access certain folders as either an Admin, Author, or Reader
- Assign certain management rights

To help maintain a secure environment within the BTRS portal, most users do not work with role-based permissions; instead, these rights are generally handled by BTRS administrators. Permissions assigned to roles are covered in detail in the *Administrator Guide*.

Logging on to the BTRS Portal

To access the BTRS software, you must log on to a secure portal. You will need the following information from your BTRS administrator before you begin:

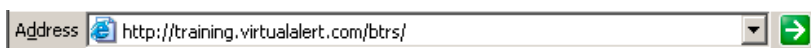
- Your user name and password you will use to log on
- The Web address (URL) of your BTRS portal



The first time you log on to the BTRS portal, you need to complete your profile information. For more information, see “Logging on for the First Time” in Chapter 3, page 31.

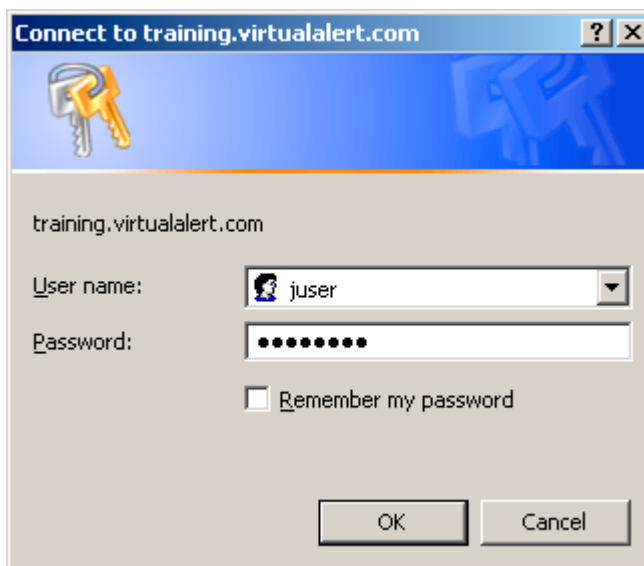
► To log on to the BTRS portal

- 1 Open Microsoft® Internet Explorer.
- 2 In the **Address** bar, type the Web address of your BTRS portal.



- 3 Press **ENTER** or click .

The *Connect to* dialog box opens.



- 4 In the **User Name** field, type the user name provided by your BTRS administrator.

Your user name is case sensitive. Make sure it appears in the field exactly as it was given to you.

If you are using Microsoft® Windows 2000, the *Enter Network Password* dialog box opens.

You may change your password after successfully logging in for the first time. For more information, see "Changing Your Password" in Chapter 3, page 42.

- 5 In the **Password** field, type your password.

Your password is case sensitive. Make sure it appears in the field exactly as it was given to you.

If you forget your password, contact your BTRS administrator. If the **Network** field appears in the *Connect to* dialog box, contact your BTRS administrator before continuing.



Be sure **not** to select the **Remember my password** check box, as doing enables others to log on to the portal without proper permission.

- 6 Click **OK**.

The *Connect to* dialog box closes and the BTRS portal appears in your browser window.

Logging off of the BTRS Portal

When you are done accessing information through the BTRS portal, you may log off and close your browser window.

► To log off of the BTRS portal

- 1 On the BTRS navigation bar, click **Logoff**.

BTRS displays a message reminding you to close your browser window to complete the log off process.

- 2 Click **Logoff**.

Microsoft® Internet Explorer displays the message, "The Web page you are viewing is trying to close the window. Do you want to close this window?"

- 3 Click **Yes**.

The browser window closes.

Navigating through the BTRS Portal

One of the first steps toward becoming an experienced BTRS user is learning how to navigate through the BTRS portal. Several pages in the portal contain standard elements to help you become familiar with the format and layout of the pages, including the BTRS navigation bar, and search and help functions. In addition, you can move between pages within the portal to return to a previous view easily using one of several methods.

Using the Navigation Bar

The BTRS navigation bar is the primary feature that enables you to quickly access all areas of the portal. On each page of the portal, the navigation bar provides links to other pages and sections.

You may also choose to close the browser by clicking the X in the top right corner of the window; however, your session will not end until you have closed all browser windows.

Home	Search	Categories	Document Library	Subscriptions	Alerts	Directory	My Profile	BTRS Admin	Logoff
------	--------	------------	------------------	---------------	--------	-----------	------------	------------	--------

BTRS navigation bar

The navigation may appear differently than the one illustrated above depending on the type of user license you have. The area of the BTRS portal that you are currently viewing appears on the navigation bar in a different color. Clicking any of the navigation bar links takes you directly to that section's main page.

As you move to other pages within the BTRS portal, the navigation bar's appearance may change to reflect the contents of that section, and a section menu may appear. For more information about using section menus, see "Using Section Menus" on page 15.

Using Shortcuts

You can quickly set up access to areas of the BTRS portal that you frequently access by using shortcuts to those pages. To create the shortcut, simply click any active link and drag it onto your desktop. The next time you double-click the shortcut, you will be prompted to log into BTRS, then the page will display.



The shortcut will no longer work if the item is renamed, deleted, or moved.

You can create shortcuts to the following items:

- Any link to the main page of a section on the BTRS navigation bar (Document Library, Subscriptions, Categories, My Profile, etc.)
- Any individual subscription, news item, announcement, alert, category, or document (checked out, pending approval, etc.) on the BTRS home page
- Any individual document, folder, or category within the Document Library or Categories sections
- Any page in the BTRS Admin section (click the link on the BTRS Admin menu; for more information about the BTRS Admin menu, see the *Administrator Guide*)

Moving between Pages

If you inadvertently access the wrong page or are finished viewing a page and want to return to the previous page you were viewing, you have the flexibility to select different methods of moving between pages, based on the page you are viewing.

Clicking the Back Button

BTRS does allow you to click Internet Explorer's **Back** button to return to the previous page you were viewing.



Back button in the Internet Explorer window



To prevent loss of data, only use the **Back** button while viewing a document to return to its folder or the BTRS home page.

Clicking "Up One" Links

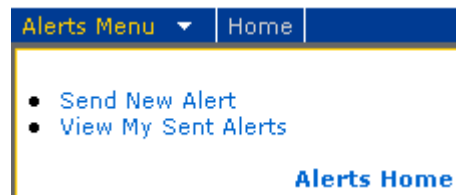
In the Document Library and Categories sections, you can click the **Up One Folder** and **Up One Category** links, respectively, to return to that folder's or category's parent folder/category.

[Up One Folder](#)

Up One Folder link

Using Section Menus

In the Alerts, Document Library, and BTRS Admin sections of the BTRS portal, menus pertaining to each section appear when you access a secondary-level page. These menus enable you to select other pages within the section, or return to the home page.



Alerts menu

To access the section menu, on the BTRS navigation bar, click the arrow next to the section title, then click the page you want to view.

Using Search

BTRS enables you to search for documents, folders, and categories within your BTRS portal using both simple and advanced searches. Simple searches allow you to look for items by keyword. Advanced searches enable to add query elements such as data, author, title, file name, and category. In addition to searching within the entire BTRS portal, while viewing pages in the Document Library or in the Categories sections, you can also perform searches within a folder or category.

The BTRS search bar appears on many pages in the BTRS portal, including the Categories, Document Library, and home pages, as well as the Search page. By default, the Search bar appears in simple search mode.



The Directory section of the BTRS portal uses a separate search function to locate users within the directory. For more information about this feature, see "Searching for Users in the Directory" in Chapter 6, page 90.

Using Search Engine Parameters

Any search feature is only effective if you are able to locate the item you are looking for, and part of the reason you might be searching is because you may not know when your item was created, what it is called, or what type of file it is. In these cases, you can use several different methods to locate what you are looking for.

While most search engines use similar methods to perform queries, the following table lists some common and basic search methods to help you:

For example, type this	To do this
regional, director, meeting	Search for items that contain the words "regional," "director," <i>and</i> "meeting"
"regional director meeting"	Search for items that contain the phrase "regional director meeting"
regional or director or meeting	Search for items that contain the words "regional," "director," <i>or</i> "meeting"
*.doc	Search for all files with a .doc extension
reg*.doc	Search for all .doc file names that begin with "reg"

Performing Simple Searches

Using the simple search method allows you to look for folders and documents quickly, by entering one or more keywords that are a part of the document or folder's title or contents, or the document's file name.

You can perform a simple search either from the Search bar on any page in the BTRS portal, or by viewing the *Search* page.

► To perform a simple search

- 1 Perform one of the following functions:

If you are viewing	Do this
Search Page	In the Search list, select This Site
Document Library Page	In the Search list, select This Site or This Folder
Categories Page	In the Search list, select This Site or This Category

If your Search bar is currently in advanced search mode, you can return to the simple search mode by clicking **Simple search**.

- 2 Using the key in “Using Search Engine Parameters” on page 16, in the **for** field, type the word or words you want to use in the search.
- 3 Click **Go**.

BTRS searches for your terms. When the search is complete, BTRS displays the search summary and matching documents.

To organize your search results, follow the steps in “Viewing Search Results” on page 18.

Performing Advanced Searches

When you want to provide more information to narrow the results of your search, you can use the advanced search method.

► To perform an advanced search

- 1 In the BTRS navigation bar, click **Search**.

– or –

On the Search bar, click **Advanced search**.

The advanced search features appear.

- 2 Perform one or more of the following tasks:

In this field or list	Do this
Search	Select This Site , This Folder , or This Category
for	Type the word or words you want to use in the search
Search by profile	Select a profile that the file is assigned to, including Announcement , Base Document , News Item , or Web Link
Search by properties	Create one or more search parameters by: <ul style="list-style-type: none"> • Selecting a data source, such as Author, File size, Description, or Title • Selecting an operand, such as “equals,” “less than,” or “contains” • Typing the value you want to include

In this field or list	Do this
Search by date	Select one of the following to search: <ul style="list-style-type: none"> • All documents • Documents created or modified within your specified date range

- 3 When you are done, click **Go**.

BTRS searches for your terms. When the search is complete, BTRS displays the search summary and matching documents.

To organize your search results, follow the steps in “Viewing Search Results” on page 18.

Viewing Search Results

After you complete your search, you can organize the results list in several ways, including by date, title, author, and match ranking.

► To sort search results

- 1 Follow the steps in either “Performing Simple Searches” on page 16 or “Performing Advanced Searches” on page 17.
- 2 On the search results page, under Matching Documents, click one of the following:

Click this	To do this
Best Match	Sort matching documents starting with highest ranking match results
Author	List matching documents alphabetically by the first letter in the author's name
Title	List matching documents alphabetically by the title of the document
Date	Sort matching documents by the date last modified

- 3 To change the order the search results are listed in from ascending to descending, click the appropriate link again.

The triangle indicator switches from  to .

For information about clearing subscription notifications, see "Clearing Subscription Notifications" on page 28. For information about deleting subscriptions, see "Deleting Subscriptions" on page 29.

Subscribing to Search Criteria

If you want to be notified when changes are made to documents or when new documents are published to the portal, you can subscribe to the search criteria you create. When any documents meeting the criteria in your search string are published or modified, a notification is posted on the BTRS home page in the Subscription Summary section. In addition, you can submit your e-mail address, and BTRS will also send you an e-mail.

► To create a search subscription

- 1 Follow the steps in either "Performing Simple Searches" on page 16 or "Performing Advanced Searches" on page 17.

Your search does not need to return any matching documents to complete this task.

- 2 On the search results page, under Search Summary, click **Subscribe to this search**.

The *New Subscription* screen appears, with your search information listed in the **Type a name for this subscription** field.

- 3 If you want BTRS to send you an e-mail notifying you of changes, type your e-mail address in the **E-mail notification** field.
- 4 If you opt to have BTRS send you an e-mail notification, in the **How Often** list, select **When a change occurs**, **Once a day**, or **Once a week**.
- 5 Click **Ok**.

BTRS creates the subscription, which appears on the BTRS home page and on the *Subscriptions* screen.

Using Help

On each page of the BTRS portal, you can access context-sensitive help that pertains to the topic you are working on. For example, if you click the **Help** link on the My Profile screen, the help text "Using My Profile" opens.

Elements of the Home Page

The BTRS home page contains several elements that provide you with a quick overview of current alerts, news, and events within your organization, as well as to updates and documents posted on the BTRS portal. These areas include:

- Active Alerts
- Categories
- Quick Links
- Document Status
- News
- Subscription Summary
- Announcements



Because your BTRS portal can be customized so that it represents the needs of your organization, your portal pages might appear differently than those of another user, and from those included in this guide.

Active Alerts

The Active Alerts section of the BTRS home page displays all active alerts sent to you, even if you have confirmed the alert. Once the alert expires, the alert no longer appears on the page, even if you have not confirmed the alert.

▼ Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

To sort active alerts, click any column title. Clicking the date and time link for an active alert displays the alert's details, including time sent, the alert sender's name, the alert message text, and the alert's expiration time. For more information about sending and receiving alerts, see "Using the Alerting System" on page 77.

Categories

The Categories section of the BTRS home page displays the highest-level categories established for your portal. Categories provide another useful method to quickly access documents.

Categories

- Bioterrorism
- BTRS Training
- Deployment Plans
- Health Advisories
- Response Plans
- Surveillance


Categories section of the BTRS home page

If you have permission to do so, you can create categories that cross-reference content by topic to locate documents you use frequently. For more information on creating categories, see the *Administrator Guide*.

Depending on how you assign categories when you post your documents, Categories folders may or may not contain the same documents and subfolders as your Document Library folders. For more information about assigning categories to documents, see “Adding Documents to the Library” in Chapter 4, page 54. For more information about Document Library folders, see “Working with Folders and Categories” in Chapter 4, page 48.

Clicking any of the category links takes you directly to the category’s page and displays all documents assigned to that category. If available, you can read additional information about the category by placing your cursor over the link.

Category : Health Advisories






Categories : Health Advisories

Notices from local, state, and federal agencies
[Subscribe to this category](#)

[Federal](#) [Local](#) [State](#)

Documents

[Hide Descriptions](#)
 Sort by: [Author](#) | [Title](#) ▲ | [Date](#)

 CDC Web Site link.doc Center for Disease Control Web site home page Discuss Subscribe Fax	Modified: 7/9/2004	Author:
 About the West Nile Virus and How It Affects You WestNile2004.pdf Brochure provides an introduction to the West Nile Virus, what it is, and how you can avoid contracting the disease. Discuss Subscribe Show Actions Fax	Modified: 7/20/2004	Author: Dept. of Health
 Jefferson County West Nile Virus Updates West Nile Virus Updates.mht Provides list by city of tests performed and positive test results for West Nile Virus as of 10/03/03. Discuss Subscribe Show Actions	Modified: 7/19/2004	Author: Jefferson Co. Dept. of Health
 Mosquito Control Program mosquito control program.pdf Provides reponse and awareness guidelines for defense against mosquito-spread WSN in South Dakota. Discuss Subscribe Show Actions Fax	Modified: 7/9/2004	Author: DOH

Category screen displaying all documents assigned to that category

Quick Links

The Quick Links section of the BTRS home page provides quick access to other areas of the BTRS portal, as well as Web sites your organization frequently accesses, such as your local or state HAN site, the Centers for Disease Control and Prevention, or the Department of Homeland Security.

Quick Links

 **Send New Alert**
[State Department of Health Services](#)
[Department of Homeland Security](#)
[Centers for Disease Control and Prevention](#)
[Using Quick Links](#)
[Using Search](#)

Quick Links section of the BTRS home page

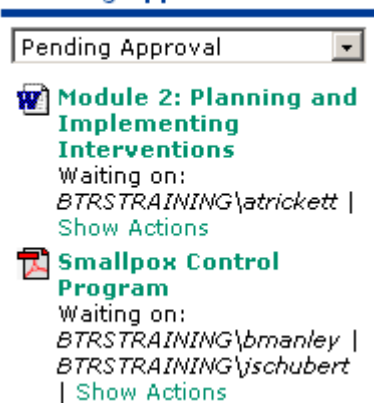
Clicking any of the Quick Links takes you directly to the designated folder, category, or Web site. If available, you can read additional information about the link by placing your cursor over the link.

Document Status

The Document Status section of the BTRS home page displays a list of documents that:

- You have checked out of the Document Library
- Another user wants to publish to the Document Library, and that must first be approved by you
- You want to publish to the Document Library, and that must first be approved by another user

Pending Approval



Document Status section of BTRS home page (Pending Approval view)

The title of the section reflects the option you select in the list. By default, the section displays documents checked out to you.

Viewing Documents Checked Out to You

Selecting **Checked Out** in the list on the BTRS home page displays the list of documents currently checked out to you.

For each document, you can perform the following functions:

Click this	To do this
The name of the document	Displays the document's contents.
Check In	Displays the <i>Check In Document</i> screen. For more information about checking in documents, see "Checking In Documents" in Chapter 4, page 54.

Click this	To do this
Show Actions	Displays the <i>Document Inspection</i> screen. For more information about document properties see “Working with Documents” in Chapter 4, page 51.

Viewing Documents Awaiting Your Approval

Selecting **Awaiting Your Approval** in the list on the BTRS home page displays the list of documents that you must approve before the document can be posted to the portal.

For each document, you can perform the following functions:

Click this	To do this
The name of the document	Displays the document's contents.
Approve/Reject	Displays the <i>Document Inspection</i> screen. For more information about document properties see “Working with Documents” in Chapter 4, page 51.

Viewing Documents Pending Approval

Selecting **Pending Approval** in the list on the BTRS home page displays the list of documents you have posted that are awaiting another user(s)'s approval before being successfully published. Under each document, a list of users who need to approve the document displays.

For each document, you can perform the following functions:

Click this	To do this
The name of the document	Displays the document's contents.
Show Actions	Displays the <i>Document Inspection</i> screen. For more information about document properties see “Working with Documents” in Chapter 4, page 51.

News

The News section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization's current news. These items are posted and managed by users with rights to publish BTRS home page content. For more information about publishing content on the BTRS home page, see the *Administrator Guide*.

Clicking any of the News links displays the contents of the document, or takes you to a designated Web page.

Subscription Summary

The Subscription Summary section displays a list of documents, folders, categories, and/or search criteria to which you currently subscribe, followed by the number of new updates posted to the portal.

Subscription Summary

Folder Subscriptions

Jefferson County (0)

Anthrax Workgroup (1)

 Anthrax Safety
Training Materials

Category Subscriptions

**Agents of Bioterrorism
(1)**

 Anthrax Safety
Training Materials

Subscription Summary section of the BTRS home page

When a change is made to a published document that affects a folder, category, or search criteria you subscribe to, that document appears on the BTRS home page under the name of the subscription. In addition, the number next to the subscription title reflects the number of notifications you have yet to clear.



Documents must be published for a subscription notification to occur.

Clicking a subscription notification link displays the document that has been changed or added. Clicking the subscription name link displays the *Subscriptions* screen.

For more information about subscriptions to categories, documents, and folders, see “Creating Subscriptions” on page 26. For more information about creating subscriptions for search criteria, see “Subscribing to Search Criteria” on page 19.

Announcements

The Announcements section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization’s current announcements, in the order they were posted. These items are posted and managed by users with rights to publish BTRS home page content. For more information about publishing content on the BTRS home page, see the *Administrator Guide*.

Clicking any of the Announcements links displays the contents of the document, or takes you to a designated Web page.

Working with Subscriptions

If a single document or set of documents cover a topic you are particularly interested in or need to keep abreast of, you can subscribe to either the individual document, or a folder or category in which the document resides. When changes are made or new documents are added, you will automatically be notified of the changes.

You can subscribe to categories, folders, documents, and search criteria. Use the following table to determine how each subscription works:

This type of subscription	Generates a subscription notification when
Category	<ul style="list-style-type: none"> • Changes are made to published documents assigned to that category • New published documents are assigned to that category (but not any subcategory)
Document	<ul style="list-style-type: none"> • Changes are made to the document and it is republished
Folder	<ul style="list-style-type: none"> • Changes are made to published documents in that folder or any subfolder • New documents are published to that folder
Search	<ul style="list-style-type: none"> • Changes are made to published documents returned by your search • New documents are published that meet your search criteria

Subscription notifications appear on the BTRS portal home page. In addition, you can also request that notification be sent to your e-mail address; you have the option to receive e-mail notifications as changes occur, or to receive daily or weekly notifications.

On the *Subscriptions* screen, you can view a list of your current subscriptions, along with active notifications. From here, you can also clear notifications you no longer need to appear on the BTRS home page. In addition, if you no longer want to be notified when changes occur to a document, or in a folder or category, you can delete the subscription entirely.

Home Search Categories Document Library **Subscriptions** Alerts Directory My Profile BTRS Admin Logoff

Subscriptions for bmanley

[Delete all subscriptions](#)


Jefferson County

Folder Subscription. E-mail notifications are not sent for this subscription.
[Delete subscription](#)

No notifications found.


Anthrax Workgroup

Folder Subscription. E-mail notifications are not sent for this subscription.
[Clear all notifications](#) | [Delete subscription](#)

 **Anthrax Safety Training Materials** Action: Modified
Modified By: BTRSTRaining\kbarnes
Time: 7/21/2004 2:34:40 PM
 356chemicalflyer.pdf
 Produced by the South Central Center for Public Health Preparedness in partnership with the Capitol Department of Public Health PREPAREDNESS UPDATE Chemical Agents of Opportunity for Terrorism: The Medical and Psychological Consequences of Toxic Industrial Chemicals and Toxic Industrial Materials
[Clear](#) | [Subscribe](#) | [Discuss](#) | [Show Actions](#)

Agents of Bioterrorism

Category Subscription. E-mail notifications are not sent for this subscription.
[Clear all notifications](#) | [Delete subscription](#)

 **Anthrax Safety Training Materials** Action: Modified
Modified By: BTRSTRaining\kbarnes
Time: 7/21/2004 2:34:40 PM
 356chemicalflyer.pdf
 Produced by the South Central Center for Public Health Preparedness in partnership with the Capitol Department of Public Health PREPAREDNESS UPDATE Chemical Agents of Opportunity for Terrorism: The Medical and Psychological Consequences of Toxic Industrial Chemicals and Toxic Industrial Materials
[Clear](#) | [Subscribe](#) | [Discuss](#) | [Show Actions](#)

[Back to top](#)

Subscriptions screen

Creating Subscriptions

Creating subscriptions to search criteria is covered separately in "Subscribing to Search Criteria" on page 19.

When you want to know when updates are made to a single document, or to documents in a folder or category, you can create a subscription.

After you create a subscription, the subscription name appears on the BTRS home page in the Subscription Summary section, and on the *Subscriptions* screen. On the BTRS home page, you can click the name of the subscription to view that subscription's notifications on the *Subscriptions* screen.

► To create a subscription to a folder or category

- 1 In the Document Library, open the folder to which you want to subscribe.

— or —

On the *Categories* screen, open the category to which you want to subscribe.


For example, if you want to subscribe to the Emergency Services folder, click the link for the Emergency Services folder to display its contents. The current folder name displays in bold.

- 2 Under the path of the category or folder, click **Subscribe**.

 Document Library : Documents : Hansworth County - Region 1 : **Emergency Services**
[Subscribe](#) | [Rename](#) | [Delete](#) | [Add Sub-Folder](#) | [Add Document](#)

The *New Subscription* screen appears.

New subscription

Subscribe to this folder:
 **Documents : Hansworth County - Region 1 : Emergency Services :**
 Emergency Services

You can request to be notified when documents in the folder change. You will also be notified of changes to documents in subfolders, as well as the creation of new subfolders.

Subscription notifications are automatically displayed in the portal. If you provide an e-mail address, you will be notified by e-mail as well.

Type a name for this subscription: (Required)

E-mail notification (optional)
 Send to:

 (For example, someone@microsoft.com)

How Often:

- 3 In the **Type a name for this subscription** field, type a name for your subscription.

By default, the name of the folder or category appears in this field. This title appears on the BTRS home page and on the *Subscriptions* screen.

- 4 If you want to receive an e-mail notification when updates occur, in the **E-mail notification** field, enter your e-mail address.

— or —

If you only want notifications to appear on the portal, skip to step 6.

- 5 In the **How Often** list, select the how frequently you would like to receive e-mail notifications: **When a change occurs**, **Once a day**, or **Once a week**.

This option does not affect notifications displayed only on the portal.

- 6 Click **Ok**.

The subscription is created.

► **To create a subscription to a document**

- 1 In the Document Library, open the folder that contains the document to which you want to subscribe.

- 2 Under the name of the document, click **Subscribe**.

The *New Subscription* screen appears.

- 3 In the **Type a name for this subscription** field, type a name for your subscription.

This title appears on the BTRS home page and on the *Subscriptions* screen.

- 4 If you want to receive an e-mail notification when updates occur, in the **E-mail notification** field, enter your e-mail address.

— or —

If you only want notifications to appear on the portal, skip to step 6.

- 5 In the **How Often** list, select the how frequently you would like to receive e-mail notifications: **When a change occurs**, **Once a day**, or **Once a week**.

This option does not affect notifications displayed only on the portal.

- 6 Click **Ok**.

The subscription is created.

Receiving Subscription Notifications

When you are notified that a change has occurred in the folder that you subscribe to, either by e-mail or by viewing it on the BTRS portal, you can view the document and/or the subscription information.

Clicking the name of the document either in the e-mail or on the BTRS home page opens the document for viewing.

Clicking the name of the subscription displays the *Subscription* screen.

Clearing Subscription Notifications

After reviewing the changes to a published document sent to you through a subscription notification, you can clear the notification so it no longer appears as a new notification on the BTRS home page or the *Subscriptions* screen. In addition, you can clear individual notifications, or all the active notifications for a subscription.

► To clear subscription notifications

- 1 On the BTRS home page, click the name of the subscription.

– or –

On the BTRS navigation bar, click **Subscriptions**.

The *Subscriptions* screen appears.

- 2 Perform one or more of the following functions:

In this area	Click this
To clear a single notification	Under the name of the document you want to clear, click Clear
To clear all notifications for a subscription	Under the title of the subscription you want to clear, click Clear all notifications

The documents are removed from the *Subscriptions* screen and BTRS home page.

Deleting Subscriptions

If you no longer need to be notified when changes occur in a document, category, or folder, or that affect the results of a search, you can delete the subscription on the *Subscriptions* screen.



Deleting the subscription does not affect the document in any way.

► To delete a subscription

- 1 On the BTRS home page, click the name of a subscription.

– or –

On the BTRS navigation bar, click **Subscriptions**.

The *Subscriptions* screen appears.

- 2 Perform one or more of the following functions:

In this area	Click this
To delete a single subscription	Under the name of the document you want to delete, click Delete subscription
To delete all subscriptions	Under the title of the subscription you want to delete, click Delete all subscriptions

The subscription(s) are removed from the *Subscriptions* screen and the BTRS home page, even if you have active notifications.

3

Creating and Managing Your Profile

As a BTRS user, you need to create a profile that contains information about you, where you work, what type of work you perform, and how you want to be contacted in the case an alert is sent to you. In addition, you can set and update passwords and codes to log on to BTRS and to confirm alerts as part of your individual profile.

Keeping the information in your profile up-to-date is critical to the success of the BTRS alerting system. As phone numbers, e-mail addresses, and job locations often change, BTRS prompts you periodically to verify your information.

When your system or BTRS administrator initially creates your account, he or she may provide some or all of your profile information. When you log on for the first time, you need to confirm and/or complete the information in your profile so that other BTRS users in your HAN can contact you and send you alerts.

Logging on for the First Time

The first time you log onto the portal, you must verify and complete the information in your profile before continuing.

You will need to do the following to complete your profile:

- Verify and/or enter your profile information – see “Maintaining Your Profile Information” on page 32
- Enter an alerting security code – “Using Alerting Security Codes” on page 36
- Create an alerting profile – “Using Alerting Profiles” on page 38

Screens for each of these profile elements appear in your browser successively to assist you in entering all the information.

You can also change your password (see “Changing Your Password” on page 42) after you complete your profile.

Maintaining Your Profile Information

Your profile is one of the most important elements of BTRS. Use the *My Profile* pages to enter information about you, including your background, and your work and home contact information. When you enter information in your profile, you can receive alerts from others in your alerting network. In addition, information you enter on this screen appears in the *My Directory* page so that others in your network with permissions can view your profile information to contact you.

When you complete and save your profile information, either for the first time or when you make changes, BTRS sends you an e-mail (to the e-mail address you specify) to confirm your changes.

Creating Your Profile

When you log on to BTRS for the first time or after not modifying your profile for 30 days, the *Profile Confirmation Required* screen appears. Enter information on this screen to complete or update your profile.

► To create your profile

- 1 Log on to the BTRS portal using the steps in “Logging on to the BTRS Portal” in Chapter 2, page 12.

After you successfully log on, the *Profile Confirmation Required* screen appears.

The screenshot shows the VirtualAlert My Profile page. The header includes the VirtualAlert logo and the text "Innovative Solutions for Public Health & Safety". Below the header is a navigation bar with links: Home, Search, Categories, Document Library, Subscriptions, Alerts, Directory, My Profile, and Logout. The main content area is divided into two columns: Actions and Information. The Actions column contains links: Back to BTRS Home, Change My Profile, Change My Alerting Profiles, Change My Password, and Set My Alerting Security Code. The Information column contains a red heading "Profile Confirmation Required" followed by the text "Our records indicate that you have not changed your profile within the last 30 days." and "Please verify that all information is correct and click Save." Below this is a section titled "* Indicates a required field" with a list of fields: Prefix (dropdown), First Name (text box with asterisk), Last Name (text box with asterisk), Main Business Category (dropdown), Professional Licenses (list box with options: Educator, Environmental, Food/Nutrition, Law Enforcement, Medical Doctor), Specialties (list box with options: Allergist/Immunologist, Anesthesiologist, Colon & Rectal Surgeon, Dermatologist, Emergency Physician), Organization (text box), Title (text box), and Degrees (text box).



Make sure you complete the information in the required fields, or you will receive an error message indicating which information needs to be completed. Missing or incorrectly formatted information is highlighted in yellow on the *Profile Confirmation Required* screen to assist you in locating errors.

2 Enter the following personal information:

In this field or list	Do this
Prefix	Select Dr. , Mr. , Ms. , or Mrs.
First Name	Type your first name <i>This is a required field</i>
Last Name	Type your last name
Main Business Category	Select the type of industry that you work in
Professional Licenses	Select one or more professional licenses that you hold <i>Press CTRL while clicking to select more than one type</i>
Specialties	Select one or more medical specialties you practice <i>Press CTRL while clicking to select more than one type</i>
Organization	Type the name of your organization
Title	Type your professional title
Degrees	Type any degrees that you hold

3 Enter the following Work Contact information:

In this field or list	Do this
Work Location	Type information about where you work, such as Building 1045, Intensive Care Wing, or Sacramento
Work Address	Type the address of the facility you work in
Work City	Type the name of the city in which your facility is located
Work State/Province	Select the state or province in which your facility is located
Work Zip/Postal Code	Type the ZIP or Postal code for the facility in which you work <i>You must enter 5-10 characters</i>

In this field or list	Do this
Work Email	Type an active work e-mail address <i>This is a required field</i> Enter the complete address; for example: joe_user@ca.gov or fred.smith@hospital.org
Work Phone	Type your work phone number, including area code and any extension <i>You must enter at least 10 digits</i>
Work Fax	Type your work fax number, including area code <i>You must enter 10 digits</i>

4 Enter the following Home Contact information:

In this field or list	Do this
Home Address	Type your home address
Home City	Type the name of the city in which you live
Home State/Province	Select the state or province in which you live
Home Zip/Postal Code	Type the ZIP or Postal code for the city in which you live <i>You must enter 5-10 characters</i>
Home Phone	Type your home phone number, including area code <i>You must enter at least 10 digits</i>

5 Enter the following Alternate Contact information:

In this field or list	Do this
Alternate Email	Type an e-mail address other than your work e-mail address Enter the complete address; for example: joe_user@ca.gov or fred.smith@hospital.org
Cell Phone	Type your cell phone number, including area code <i>You must enter 10 digits</i>
Alpha Pager	Type the e-mail address of your alpha pager Enter the complete address; for example: 6498511022@pagerco.net

In this field or list	Do this
Numeric Pager #	Type the phone number of your numeric pager <i>You must enter 10 digits</i>
Alternate Phone	Type a phone number other than that of your primary work, home, or cell phones, including area code <i>You must enter at least 10 digits</i>
Satellite Phone	Type the number of your satellite phone, including area code
Other Means of Contact	Provide information for any additional means people may use to contact you <i>This information can be an e-mail address, or a phone or fax number</i>

6 Enter the following Miscellaneous information:

In this field or list	Do this
Languages Spoken	Select one or more languages that you speak
CPR Certified	Select this check box if you are certified to perform cardio-pulmonary resuscitation (CPR)

7 Click **Save**.

The *User Profile Change Confirmation* screen appears.

8 Click **OK**.

The *My Profile* page appears.

– or –

If you are logging on for the first time, the *Set My Alerting Security Code* screen appears. Follow the steps in “Setting Your Alerting Security Code” on page 37 to set your alerting security code.

BTRS also sends you an e-mail to confirm the information you just entered.

Updating Your Profile Information

You can change your profile information at any time if your contact information changes, such as your office location, phone number, or e-mail address. In addition, if you do not make any changes to your profile, every 30 days BTRS will prompt you when you log on to verify your information and make any necessary updates.

► To update your profile information

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears and displays your current profile information.

- 2 Under Actions, click **Change My Profile**.

The *Change My Profile* screen appears.

- 3 Using the steps in “To create your profile” on page 32 as a guide, make any changes to your profile.

- 4 At the bottom of the screen, click **Save**.

BTRS displays the message, “Profile successfully changed!”

- 5 Click **OK**.

The *My Profile* page appears, and BTRS sends you an e-mail to confirm the changes you made.

Using Alerting Security Codes

The alerting security code is a four-digit number you enter to confirm an alert over the phone. When you receive an alert via a phone call at one of your designated phone numbers, you will be asked to enter this number to confirm your identity before the alert message will play.

Your alerting security code does not expire, but you can change the number at any time through the BTRS portal. You may also choose to have your BTRS administrator change your code for you.



Your alerting security code and your password (which you use to log into BTRS) have different values and are not used for the same purpose. For more information on passwords, see “Changing Your Password” on page 42.

Setting Your Alerting Security Code

As part of the profile confirmation process, the first time you log on to the BTRS portal, you will be prompted to create an alerting security code.

VirtualAlert My Profile
Innovative Solutions for Public Health & Safety

Home | Search | Categories | Document Library | Subscriptions | Alerts | Directory | My Profile | Logoff

Actions

- Back to BTRS Home
- Change My Profile
- Change My Alerting Profiles
- Change My Password
- Set My Alerting Security Code**

Information

Set My Alerting Security Code
Our records indicate that you have not set an Alerting Security Code!

You must set your Alerting Security Code before creating Alerting Profiles. An Alerting Security Code insures the delivery of secure alerts over automated voice systems. The Alerting Security Code entered must consist of exactly 4 numbers.

New Alerting Security Code:

Verify New Alerting Security Code:

Set My Alerting Security Code screen

The *Set My Alerting Security Code* screen only appears when you log on for the first time, after you complete the steps in “Creating Your Profile” on page 32. To change an existing security alerting code, follow the steps in “Changing Your Alerting Security Code” on page 38.

► **To set your alerting security code**

- 1 On the *Set My Alerting Security Code* screen, in the **New Alerting Security Code** field, type the four-digit alerting security code you want to use.
- 2 In the **Verify New Alerting Security Code** field, reenter your alerting code.
- 3 Click **Save**.

The *Alerting Security Code Change Confirmation* screen appears.

- 4 Click **OK**.

The *Create an Alerting Profile* screen appears. Use the steps in “Creating Alerting Profiles” on page 39 to create your alerting profile.

Changing Your Alerting Security Code

You can change your alerting security code at any time to another four-digit number, either for security reasons, or if you've forgotten the number.

► To change your alerting security code

- 1 On the BTRS navigation bar, click **My Profile**.
The *My Profile* screen appears.
- 2 Under Actions, click **Change My Alerting Security Code**.
The *Change My Alerting Security Code* screen appears.
- 3 In the **New Alerting Security Code** field, type the new four-digit alerting security code you want to use.
- 4 In the **Verify New Alerting Security Code** field, reenter your alerting code.
- 5 Click **Save**.
BTRS displays the message, "Alerting Security Code successfully changed for [your name]!"
- 6 Click **OK**.
The *My Profile* screen displays, showing your current profile information.

Using Alerting Profiles

Depending on your organization's alerting procedures and regulations, your organization may need to contact you with an alert at various times, even if you're away from the office or at another location. After you set your alerting security code, you have the ability to create, edit, and activate several different alerting profiles to meet those needs.

About Alerting Profiles

Alerting profiles merely provide a way for you to tell BTRS how you want to be notified in case an alert is sent to you. BTRS allows you to create an automated list of contact methods, such as cell phone, e-mail, and pagers, for low, medium, and high profile alerts. In addition, you can specify which of those contact methods you want to use for each alert, based on the alert's priority (low, medium, or high), and the order in which the alert is sent to each device.

You can create several different profiles that enable you to specify different scenarios for contacting you. For example, when you are at work, you may want to be notified of an alert through your work e-mail address and work phone. When you go home, however, or if you are called away from your office, you may opt to be notified through other methods, such as your home phone, cell phone, or pager. In addition, if you travel or plan a vacation, and will not be able to respond to alerts, you

may want to create another profile that sends notifications to your work e-mail only, or does not notify you at all. By creating several alerting profiles, you need only to change your active alerting profile when your alerting situation changes.

Creating Alerting Profiles

The first time you log on to BTRS, you are prompted to create an alerting profile as part of the profile confirmation process. In addition, you can create additional profiles at any time. Creating an alerting profile enables your organization to alert you using the methods you designate.



You may opt to not create an alerting profile when you first log on to BTRS. If you do not create and activate any alerting profile, you will still receive an e-mail each time an alert is sent to your role.

► To create an alerting profile

- 1 On the BTRS navigation bar, click **My Profile**.

— or —

If you are logging on for the first time, after completing the steps in “To set your alerting security code” on page 37, skip to step 4.

The *My Profile* screen appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change the Alerting Profiles* screen appears.

If you are logging on for the first time, the *Create an Alerting Profile* screen appears after you complete the steps in “To set your alerting security code” on page 37.

- 3 Click **New**.

The *Profile Name* screen appears.

- 4 In the **Profile Name** field, type the name you want to give your alerting profile.

Create a name that accurately reflects the purpose of the profile, such as “daily,” “weekend,” “on call,” or “vacation.”

- 5 To make this alerting profile active, select the **Activate** check box.
- 6 Under High Priority Alerts, in the **Location** lists, select one or more contact devices you would like BTRS to send alerts to when high priority alerts are sent to you.

When an alert is sent to you, the device you select in the **Location 1** list will be contacted first; the device in the **Location 2** list will be contacted second, etc.



If you create and activate an alerting profile in which you select **(none)** for all locations, you will *only* receive alerts on the BTRS portal.

If you are logging on for the first time, you can now continue to the portal home page. Under Actions, click **Back to BTRS Home**.

- 7 Repeat step 6 for the Medium and Low Priority Alerts sections.
- 8 Click **Save**.

The *Change My Alerting Profiles* screen appears and displays the profile you created.

Activating Alerting Profiles

You can choose to activate any of your alerting profiles at any time so you receive alerts through the proper contact devices. Each time your alerting situation changes, simply repeat these steps to change your active alerting profile.

BTRS administrators can also activate a different alerting profile for you. For more information, contact your BTRS administrator.

You can activate your alerting profile in one of two ways: when you are creating your alerting profile (see “Creating Alerting Profiles” on page 39), or by selecting an existing profile.

► **To activate an alerting profile**

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* screen appears.

- 3 Select the alerting profile that you would like to activate.

- 4 Click **Activate**.

The alerting profile is activated, and the *Change My Alerting Profiles* screen displays your selection as the active profile.

Editing Alerting Profiles

You have the option at any time to edit your alerting profiles by changing how you want to be contacted for one or more alerting priorities.

► **To edit an alerting profile**

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* screen appears.

- 3 Select the alerting profile that you would like to change.

- 4 Click **Edit**.

The *Profile Name* screen appears, and displays the profile’s current information.

- 5 Make any necessary changes to your alerting profile.

- 6 Click **Save**.

BTRS saves your changes and displays the *Change My Alerting Profiles* screen.

Deleting Alerting Profiles

When you no longer need to use a particular alerting profile, you can delete it so that it no longer appears in the alerting profile list.

► To delete an alerting profile

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* screen appears.

- 3 Select the alerting profile that you would like to delete.

- 4 Click **Delete**.

BTRS displays the message, “Are you sure you want to delete [name of alerting profile]?”

- 5 Click **OK**.

The alerting profile is removed from the alerting profile list.

Changing Your Password

When your BTRS administrator creates your user account, he or she assigns a user name and password that you use to log into BTRS. Although your user name cannot be changed, you can change your password after you log on for the first time.

Before changing your password, be sure that you follow your organization’s security guidelines or requirements for your password. Check with your BTRS administrator if you have any questions.

After you change your password successfully, BTRS requires you to log in using your new password.



Your password is not the same as your alerting security code, which is the four-digit number you use to identify yourself on the phone when you receive an alert. For more information on alerting security codes, see “Setting Your Alerting Security Code” on page 37.

► To change your password

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* screen appears.

- 2 Under Actions, click **Change My Password**.

The *Change My Password* screen appears.

Home Search Categories Document Library Subscriptions Alerts Directory My Profile Logoff	
Actions	Information
<ul style="list-style-type: none"> Back to BTRS Home Change My Profile Change My Alerting Profiles Change My Password Set My Alerting Security Code 	<p>Change My Password</p> <p>Enter your current password, then enter your new password information and click 'Save'.</p> <p>Current Password: <input type="password"/></p> <p>New Password: <input type="password"/></p> <p>Verify New Password: <input type="password"/></p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p>

- 3 In the **Current Password** field, type your existing password.
- 4 In the **New Password** field, type the new password you want to use.
- 5 In the **Verify New Password** field, reenter your new password.
- 6 Click **Save**.
BTRS displays the message, "Are you sure you want to change your password?"
- 7 Click **OK**.
BTRS displays the message, "Password successfully changed!"
- 8 Click **OK**.
The *Connect to [BTRS portal URL]* dialog box displays.
- 9 Using your new password, log on to the BTRS portal.

4 Using the Document Library

The Document Library section of the BTRS portal acts both as a storage facility for your organization's documents and as an arena for drafting, discussing, working with others on, and approving documents for publication. In the library, you can share documents as you might on an Intranet or network, but you can also check in drafts you are still working on, so that other users will not be able to view those documents. In addition, each folder in the library can have different levels of security applied; this means that confidential data is only made available to the appropriate BTRS users.

The Document Library enables you to:

- Control document access based on role-based permissions
- Apply descriptions to document properties to help make documents searchable
- Control document publishing based on user permissions
- Use Web discussions to incorporate online comments from multiple document reviewers
- Track and view a document's publishing history

Before you begin working in the Document Library, take a moment to read about and understand how the library works and what types of permissions are available. When you are ready, read on to learn more about working with both folders and documents.

Understanding Document Library Permission Levels

If you have a BTRS Admin license and rights to publish content to the portal home page, you can publish documents to those folders through the Document Library. For more information about publishing content on the home page, see the *Administrator Guide*.

If you have either a BTRS Collaboration or BTRS Administration license, you can view and access the Document Library section of the BTRS portal. Users with Alerting level licenses do not see this link on the BTRS navigation bar.

When you access the Document Library, you can search for, read, add, edit, discuss, and/or delete documents and folders based on your permission level for that folder. In addition, each folder may or may not include approval routing, which enables folder administrators to require that specific users approve each document before it can be published to that folder.



Keep in mind that while you may be assigned one type of permission for a particular folder, you may be assigned another for a second folder, and so on.

The following table describes the kinds of functions you can perform in a folder for each permission level:

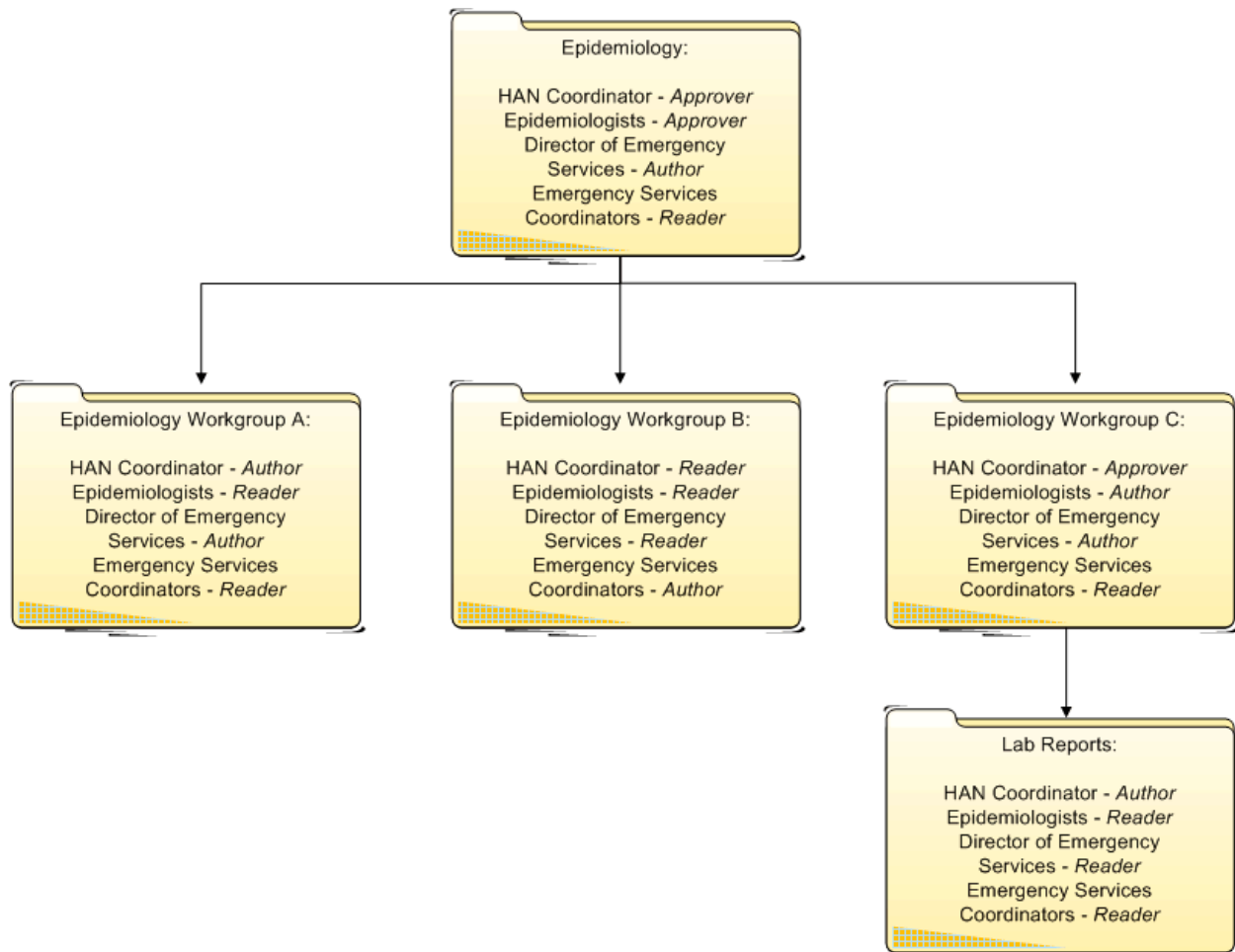
This permission level	Can do this		Cannot do this	
	In folders	In documents	In folders	In documents
Reader	<ul style="list-style-type: none"> View folders 	<ul style="list-style-type: none"> Search for and read published documents Subscribe to folders and documents Participate in document discussions 	<ul style="list-style-type: none"> Add, delete, or rename folders 	<ul style="list-style-type: none"> Check-out, add, edit, or delete documents View checked-in versions of documents
Author	<ul style="list-style-type: none"> Create, rename, and delete folders 	<ul style="list-style-type: none"> Subscribe to folders and documents Participate in document discussions Search for, read, add new, edit, and delete all drafts and published documents 	<ul style="list-style-type: none"> Change user permissions of folders that they create 	
Admin	<ul style="list-style-type: none"> Create, rename, and delete folders Assign approval routing for folders they administer Assign permissions for folders they administer 	<ul style="list-style-type: none"> Subscribe to folders and documents and participate in document discussions Search for, read, add new, edit, delete all drafts and published documents 		
Approver (can be either Reader, Author, or Admin)		<ul style="list-style-type: none"> Approve or reject documents submitted to that folder for publication 		

Putting Document Library Permission Levels to Work

The first step to working successfully in the library is understanding the parent/child relationship between folders. While the next section “Working with Folders and Categories” covers working with folders in more detail, the following diagram shows a sample Document Library environment with several folders, each with different permissions assigned to various roles. Use this diagram as reference for different scenarios your organization might have.



You can confirm what access permissions you have for a particular folder by looking at the **Current Folder Rights** section near the top of each folder’s screen.



Sample folder directory in the Document Library with assigned folder permissions

Working with Folders and Categories

Other than through categories, folders provide the both the permissions and structure and the organizational structure for your documents in the Document Library. Planning and maintaining your folder structure is a very important element of creating an efficient workspace for you and your coworkers. Depending on the Document Library permission levels you have, BTRS enables you to create, rename, or delete folders. In addition, if a folder contains information you particularly need to know about and stay current with, you can subscribe to that folder and be notified when new documents are posted or when changes are made.

Understanding Categories



For more information about how categories work, see “Categories” in Chapter 2, page 20. For information about assigning categories to documents when you post them on the portal, see “Adding Documents to the Library” on page 54.

Categories provide another method for you to organize your documents. You can assign categories to each document you post to the Document Library, to help locate and sort documents. You can create categories based on the document’s function (such as calendar, memo, or report), by the users in a role who need to access the document (such as workgroup, task force, or management), or the document’s topic (such as smallpox, homeland security, or emergency services).

Standard and Enhanced Folders

Within the Document Library, two types of folders are available: standard and enhanced. While both folders enable you to further your document organization, enhanced folders provide additional functionality, including document check in, publishing, and version history.

The following table shows which document features each folder type supports:

This folder type		Supports these elements			
		Profiles	Check in/out	Publishing	Version history
	Standard	X			
	Enhanced	X	X	X	X

Creating Folders

When BTRS is installed, the Document Library section contains three folders: Dashboards, Documents, and Portal Content. While the Dashboards and Portal Content folders are used primarily by BTRS administrators, the Documents folder provides access to the entire Document Library structure. Based on your permission level access for each folder within this structure, you may be able to create subfolders in the library to store your documents.

You can confirm what access permissions you have for a particular folder by looking at the **Current Folder Rights** section near the top of each folder's screen.

► To create folders

- 1 In the Document Library, open the folder in which you want to create a subfolder.

For example, if you want to create a new folder within the Emergency Services folder, click the link for the Emergency Services folder to display its contents. The current folder name displays in bold.

 Document Library : Documents : Hansworth County - Region 1 : **Emergency Services**
[Subscribe](#) | [Rename](#) | [Delete](#) | [Add Sub-Folder](#) | [Add Document](#)

The *Document Library* screen updates to reflect the folder's structure.

- 2 Under the folder's path, click **Add Sub-Folder**.

The *Create a new folder* screen appears.

- 3 In the **Enter the name for this folder** field, type the name for your new folder.
- 4 Click **Create**.

The *Document Library* screen appears and displays the new folder.

Renaming Folders

In folders where you have permission to do so, you can update the name of the folder, and your documents will remain in the folder with its new name.



When you rename a folder, all Web discussions associated with documents in that folder are removed. If you want to retain your previous discussions, delete the documents from the folder, and publish them to the renamed (or new) folder. For more information about discussing documents, see "Discussing Documents" on page 66.

► To rename a folder

- 1 In the Document Library, open the folder that you want to rename.
For example, if you want to rename the Emergency Services folder, click the link for the Emergency Services folder to display its contents. The current folder name displays in bold.

 [Document Library](#) : [Documents](#) : [Hansworth County - Region 1](#) : **Emergency Services**
[Subscribe](#) | [Rename](#) | [Delete](#) | [Add Sub-Folder](#) | [Add Document](#)

The *Document Library* screen updates to reflect the folder's structure.

- 2 Under the folder's path, click **Rename**.

This option does not appear if you do not have permission to rename the folder.

The *Rename a folder* screen appears.

- 3 In the **Enter the new name for the folder** field, type the new name you want the folder to have.
- 4 Click **Save**.

The *Document Library* screen appears and displays the renamed folder.

You can confirm what access permissions you have for a folder by looking at the **Current Folder Rights** section near the top of each folder's screen.

Deleting Folders

If you have Admin permissions in a folder (as well as in all that folder's subfolders), you can delete the folder.



When you delete the folder, you will also delete any documents in that folder, as well as subfolders and those folders' contents.

► To delete a folder

- 1 In the Document Library, open the folder that you want to delete.
For example, if you want to delete the Emergency Services folder, click the link for the Emergency Services folder to display its contents. The current folder name displays in bold.

 [Document Library](#) : [Documents](#) : [Hansworth County - Region 1](#) : **Emergency Services**
[Subscribe](#) | [Rename](#) | [Delete](#) | [Add Sub-Folder](#) | [Add Document](#)

The *Document Library* screen updates to reflect the folder's structure.

- 2 Under the folder's path, click **Delete**.

This option does not appear if you do not have permission to delete the folder.

BTRS displays the message, "Are you sure that you want to delete this folder and all of its contents?"

You can confirm what access permissions you have for a folder by looking at the **Current Folder Rights** section near the top of each folder's screen.

3 Click **OK**.

The *Document Library* screen updates to reflect that the folder has been deleted.

Subscribing to Folders

For more information about creating subscriptions, clearing subscription notifications, or deleting subscriptions, see “Working with Subscriptions” in Chapter 2, page 25.

If a folder contains several documents that cover a topic you are particularly interested in or need to keep abreast of, you can subscribe to that folder and be notified when:

- Changes are made to published documents in that folder or any subfolders
- New documents are published to that folder or any subfolders

Subscription notifications appear on the BTRS portal home page. In addition, you can also request that notification be sent to your e-mail address; you have the option to receive e-mail notifications as changes occur, or to receive daily or weekly notifications. To create a subscription, see “Creating Subscriptions” in Chapter 2, page 26.

Working with Documents

Within the folders of the Document Library, you can post several types of files for a variety of purposes. You can choose to check in a document that is in progress, or publish the document so that other users may view it. In addition, you can participate in discussions for a particular document, fax the document to other BTRS users, and edit and update your document’s profile and file.

Types of Documents

By default, each folder in the Document Library enables you to publish base – or standard – documents. Base documents can represent several different types of files, including documents, graphics, databases, and spreadsheets. In addition, your BTRS administrator may enable additional types of document profiles that you can use to associate with your files.



The Web Link, Announcement, and News Item profiles in the Document Library are only document types, and do not correlate in any way to the News, Announcements, and Quick Links sections of the BTRS home page.

For this type of document	You can create this kind of profile
Base document	Standard document in the Document Library (can be document file, such as .doc, .xls, .pdf, .ppt, .mdb, .htm, or .txt; or graphics file, such as .bmp, .gif, or .jpg)




For this type of document	You can create this kind of profile
Web link	Link to a page of a Web site
Announcement	Standard document (see above), but does not include category or description options
News Item	Standard document (see above), but does not include category or description options

Viewing Documents in the Library

If you have permission to do so, you can view folders and documents in the Document Library and Categories sections of the BTRS portal. Depending on what document profile is assigned to the document, and whether the document is stored in an enhanced or standard folder, you can also view information about the document, including its status and publishing history. In addition, you may be able to check in or out, rename, update the profile for, and/or publish the document.

Understanding Document Library Icons


While working in the Document Library section you may see documents in various stages of publication. Look for the following icons under document names to easily recognize these stages:

This symbol	Means this
	The document must be approved by one or more designated approvers before any action can be taken
	The document has been published to the Document Library
	The document is currently checked out to a user



Checked-in documents do not have an associated icon.

In addition, each document posted in the library displays the icon of application in which it was created.

For example, documents created using Microsoft Word display the  icon next to the document title.

Showing Available Actions

For every document checked in or published to the Document Library, you can perform one or more functions, including checking out, deleting, or viewing the document's publishing history. What actions you can perform are determined by your permissions in that folder, and the document's status.

The following table describes each possible action you can select for a document, and the results of selecting that action:

Click this	To do this
Back to previous view	Return to the folder or category in which your document is stored
Delete	Remove the document from the Document Library (no recovery)
Rename	Display the <i>Rename a document</i> screen
Check Out	Display the <i>Check out a document</i> screen
Check In	Display the <i>Check in a document</i> screen
Undo Check Out	Restore the document to the portal in its previous state (no changes saved after check out)
Publish	Display the <i>Publish a document</i> screen
Version History	Display the <i>Version history</i> screen

Viewing Document Version History

For each document checked in or published to an enhanced folder in the Document Library, you can view both the document's publishing history and the document's contents at each stage of the publishing process.

► To view a document's version history

- 1 In the Document Library, open the folder that contains the document for which you want to view document history.

For example, if you want to open the Emergency Services folder, click the link for the Emergency Services folder to display its contents. The current folder name displays in bold.

 [Document Library](#) : [Documents](#) : [Hansworth County - Region 1](#) : **[Emergency Services](#)**
[Subscribe](#) | [Rename](#) | [Delete](#) | [Add Sub-Folder](#) | [Add Document](#)

- 2 Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

- 3 Under Actions, click **Version History**.

The *Version history* screen appears, displaying the publishing history of your document.

- 4 To review the contents for any version of the document, click the link for the version number you wish to view.

Adding Documents to the Library

You have the ability to post documents to the Document Library in one of two ways: either by checking in a draft version of your document, or by publishing it to the portal. Checking in a document enables you to save a working version of the document on the portal without publishing it for all readers of that folder. Only those with permission to access checked in documents are able to view the document. When you are ready to present your final version, you can publish your document in the folder. All users with permission to view the folder can then view your published document.

Using either method, you can provide information about your document that helps those with permission to view your document to locate the document on the portal and determine the document's purpose.

Checking In Documents

You can check in your document drafts to enhanced folders as you are working on them to save versions and enable other users to provide feedback using Web discussions. Only those users with author or admin permissions in the folder may view checked-in documents.

You can either check in a new document to the library, or check in a document you have already checked out.

Check in and publish features are only available in enhanced folders. For more information about standard and enhanced folders, see "Standard and Enhanced Folders" on page 48.



You must have author or admin permissions for the folder to check in documents (and view checked-in documents).

► To check in a new document

- 1 In the Document Library, open the folder you want to check the document into.

For example, if you want to check a document into the Emergency Services folder, click the link for the Emergency Services folder to display its contents. The current folder name displays in bold.

 [Document Library](#) : [Documents](#) : [Hansworth County - Region 1](#) : **[Emergency Services](#)**
[Subscribe](#) | [Rename](#) | [Delete](#) | [Add Sub-Folder](#) | [Add Document](#)

- 2 Under the path of the folder, click **Add Document**.

The *Add a document* screen appears.

- 3 Next to the **Document file** name field, click **Browse**.

The *Choose file* dialog box opens.

- 4 Navigate to and select the file that you want to check in.
- 5 Click **Open**.

The *Choose file* dialog box closes, and the document path appears in the *Document file* name field.



Add a document

Add a document to this folder:
Documents for Our Group Only

Select the document to add to the workspace folder. Then choose whether you want to check in or publish the document.

Document file name:
 C:\Documents and Settings\FighttheBite_prevention.p...

☒ **Check in the document**
 Authors in the folder can view and edit it. It will not appear in search results or categories until it is published.

☐ **Publish the document**
 Readers in the folder can see it if no approval process is pending. It will appear in search results and in categories when published.

- 6 Select the **Check in the Document** option.
- 7 Click **Continue**.

The *Document Profile* screen appears.

Version comments

Enter comments about this version of this document.

Enter your version comments:
 Reviewed and edited section on safety for children.

Document profile

Checking in this document:
Lightning—The Underrated Killer
 Lightning Safety(1.1).doc

The information you provide in the document profile will ensure quality search results for other users of this workspace.
 * Indicates required information

Select a profile:
 Base Document

Title
 Lightning—The Underrated Killer

Author
 National Weather Service

Description
 Provides information avoiding injury during heavy thunderstorms that include lightning.

Categories
 -BTRIS Training
 -Health Advisories
 -Response Plans
 -Health Advisories: Federal
 -Health Advisories: State
 Use Ctrl+Click to select multiple values.

Keywords
 lightning; prevention; safety; emergency services; weather; storm
 Use semi-colons to separate multiple values.

- 8 Under Version comments, in the **Enter your version comments** field, type any information about this draft that will help other users know the status of your document.

This information appears on the *Version history* screen.

- 9 Under Document Profile, in the **Select a profile** list, select **Base Document** from the available options.

You may also select Web Link, News Item, or Announcement if the profiles are available for that folder. For more information about document types, see “Types of Documents” on page 51.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields on this screen.

- 10 In the **Title** field, type the document name you want to display in the library.
- 11 In the **Author** field, type the name of the person who either created or is responsible for this document.
- 12 In the **Description** field, type any comments or introductory information about this document that will help others to identify it.
This information displays under the name of the document when it is posted.
- 13 In the **Categories** list, select one or more categories to which this document should be assigned.
To select more than one category, press the **CTRL** key while clicking. To deselect a category, press **CTRL** and click the category again.
- 14 In the **Keywords** field, type one or more words that users can type to search for your document.
Type a semicolon between entries.
- 15 Click **Save**.

The *Document Library* screen appears and displays your document as checked in.

► To check in a checked out document

- 1 In the Document Library, open the folder that contains the document you checked out.
- 2 Under the name of the checked out document, click **Show Actions**.

The *Document Inspection* screen appears.

VirtualAlert Document Inspection Help

Innovative Solutions for Public Health & Safety

Actions	Information
Back to previous view Delete Rename Undo Check Out Check In Publish Version History	<p>Lightning—The Underrated Killer Lightning Safety.doc</p> <hr/> <p>Working copy version 2.1</p> <p>Status: Checked out to USERTRAINING\bmantly Modified: 7/22/2004 Modified By: bmantly Version: 2.1</p> <p>Folder: /Documents/Hansworth County - Region 1/Emergency Services URL: http://training.virtualalert.com/BTFS/SHADOW/Documents/Hansworth%20County%20-%20Region%201/Emergency%20Services/Lightning%20Safety(2.1).doc</p> <hr/> <p>Profile:</p> <p>Title: Lightning—The Underrated Killer Author: National Weather Service Description: Provides tips and awareness for protecting yourself against lightning during periods of severe weather. Categories: Response Plans; Health Advisories:Federal; Health Advisories:State; Health Advisories:Local Keywords: lightning; severe weather Created: 7/22/2004 Owner: USERTRAINING\bmantly Size: 30.50 KB</p> <hr/> <p>Published version</p> <p>URL: http://training.virtualalert.com/BTFS/Documents/Hansworth%20County%20-%20Region%201/Emergency%20Services/Lightning%20Safety.doc</p>

- 3 Under Actions, click **Check In**.

The *Check in document* screen appears.



Check in document

Check in this document:
☒ **Lightning—The Underrated Killer**
 Lightning Safety.doc

If you have copied the document to your computer and made changes, you need to copy it back to the workspace in order to check in a version with your changes.

☒ **Copy the document from my computer to the workspace**

Document file name:
 C:\Documents and Settings\Lightning Safety.doc

- 4 Make sure the **Copy from my computer to the workspace** check box is selected.



If you do not select the check box, the updated file on your computer is not uploaded to the portal.

- 5 Next to the **Document file name** field, click **Browse**.

The *Choose file* dialog box opens.

- 6 Navigate to and select the file that you want to check in.

- 7 Click **Open**.

The *Choose file* dialog box closes, and the document path appears in the Document file name field.

- 8 Click **Continue**.

The *Document Profile* screen appears.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields on this screen.

Version comments

Enter comments about this version of this document.

Enter your version comments:
 Reviewed and edited section on safety for children.

Document profile

Checking in this document:
☒ **Lightning—The Underrated Killer**
 Lightning Safety(1.1).doc

The information you provide in the document profile will ensure quality search results for other users of this workspace.

* Indicates required information

Select a profile:
 Base Document

Title
 Lightning—The Underrated Killer

Author
 National Weather Service

Description
 Provides information avoiding injury during heavy thunderstorms that include lightning.

Categories
 I&D/RS Training
 Health Advisories
 Response Plans
 Health Advisories/State
 Use Ctrl+Click to select multiple values.

Keywords
 lightning; prevention; safety; emergency services; weather; storm
 Use semi-colons to separate multiple values.

- 9 Make any necessary changes to the document's profile and version comments.

10 Click **Save**.

The *Document Inspection* screen appears and displays your document as checked in.

Publishing Documents

When you are ready to, you can publish your document to enhanced folders so that other users can view it and provide feedback using Web discussions.



Only those users with permissions to view the folder may view the document. Even if you add document profile information, users without permission will not see the document in any category or search results.

You can either publish a new document to the library, or publish a document you have already checked in. You can also publish a document you have checked out, but not yet checked back in.



You must have permission to add documents to the folder before you can publish documents. In addition, if the folder has been assigned approval routing, the document must be approved before it can be published. For more information about folder permissions, see “Putting Document Library Permission Levels to Work” on page 47. For more information about approval routing, see “Approving and Rejecting Documents” on page 60.

► **To publish a new document**

- 1 In the Document Library, open the folder to which you want to publish the document.
- 2 Under the path of the folder, click **Add Document**.

The *Add a document* screen appears.



- 3 Next to the **Document file name** field, click **Browse**.

The *Choose file* dialog box opens.

- 4 Navigate to and select the file that you want to publish.
- 5 Click **Open**.

The *Choose file* dialog box closes, and the document path appears in the **Document file name** field.

- 6 Select the **Publish the Document** option.
- 7 Click **Continue**.

The *Document Profile* screen appears.

Version comments

Enter comments about this version of this document.

Enter your version comments:

Reviewed and edited section on safety for children.

Document profile

Checking in this document:

☒ **Lightning--The Underrated Killer**
Lightning Safety (1-1).doc

The information you provide in the document profile will ensure quality search results for other users of this workspace.

* Indicates required information

Select a profile:

Base Document

Title

Lightning--The Underrated Killer

Author

National Weather Service

Description

Provides information avoiding injury during heavy thunderstorms that include lightning.

Categories

BTRIS Training
Health Advisories
Response Plans
Health Advisories:Federal
Health Advisories:State
Use Ctrl+Click to select multiple values.

Keywords

lightning; prevention; safety; emergency services; weather; storm
Use semi-colons to separate multiple values.

Save **Cancel**

- 8 Under Version comments, in the **Enter your version comments** field, type any information about this published document that will help other users recognize the status of your document.

This information appears on the *Version History* screen.

- 9 Under Document Profile, in the **Select a profile** list, select **Announcement**, **Base Document**, **News Item**, or **Web Link**.
Depending on the profiles assigned to the folder, one or more of these options may not appear in the list.
- 10 If you selected **Web Link** in step 9, in the **Link** field, type the URL that you want to display when the user clicks the name of the document.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields.

- 11 In the **Title** field, type the document name you want to display in the library.
- 12 In the **Author** field, type the name of the person who either created or is responsible for this document.
- 13 In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document when it is posted.

- 14 In the **Categories** list, select one or more categories to which this document should be assigned.

This list only appears if you are posting a Base Document or Web Link.

To select more than one category, press the **CTRL** key while clicking.

To deselect a category, press **CTRL** and click the category again.

- 15 In the **Keywords** field, type one or more words that users can type to search for your document.

This field only appears if you are posting a Base Document.

Type a semicolon between entries.

- 16 Click **Save**.

The *Document Library* screen appears and displays your document as published.

► **To publish a previously posted document**

- 1 After completing either set of steps in “To check in a new document” on page 54 or “To publish a new document” on page 58, open the folder that contains the document you want to publish.

- 2 Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

- 3 Under Actions, click **Publish**.

BTRS displays the message, “Are you sure that you want to publish this document?”

- 4 Click **OK** to publish the document.

The *Document Library* screen appears and displays your document as published.

If the document is currently checked out, the *Publish document* screen appears. Follow the steps in “To publish a new document” on page 58 to complete the publishing process.

Approving and Rejecting Documents

As you complete your documents, you may want to publish those finished documents to the BTRS portal. Depending on your organization’s structure and preferences, some folders in the Document Library may be assigned approval requirements for all documents published to that folder. Folders may have one or more users assigned as approvers. Each approver has the ability to approve or reject each document added to the folder.

Approval routing is the only type of permission in BTRS that is set by individual user, rather than by role or by role group.

About Approval Routing

In enhanced folders, users who have been selected as approvers for that folder act as reviewers for all documents published to the folder. Before any content can be published, each designated approver must approve the document; when the final approval is made, the document is automatically published.

For more information about setting approval routing for a folder, see the *Administrator Guide*.

For each enhanced folder, the folder administrator(s) can select one of four reviewing methods:

For this method	Approval must follow this order
No approval required	None (set by default)
Everyone must approve (parallel)	All persons selected must approve the document, in any order
Only one approval needed	Any one of the selected persons must approve the document
All must approve in assigned order (serial)	All persons selected must approve the document, in the order they appear in the Approvers list As the document is approved, only one approver at a time will see the document in the Awaiting Your Approval list on the home page

Special icons appear under documents that have been published, those waiting for approval, and those that are checked out. For more information about what the icons represent and what they look like, see “Understanding Document Library Icons” on page 52.

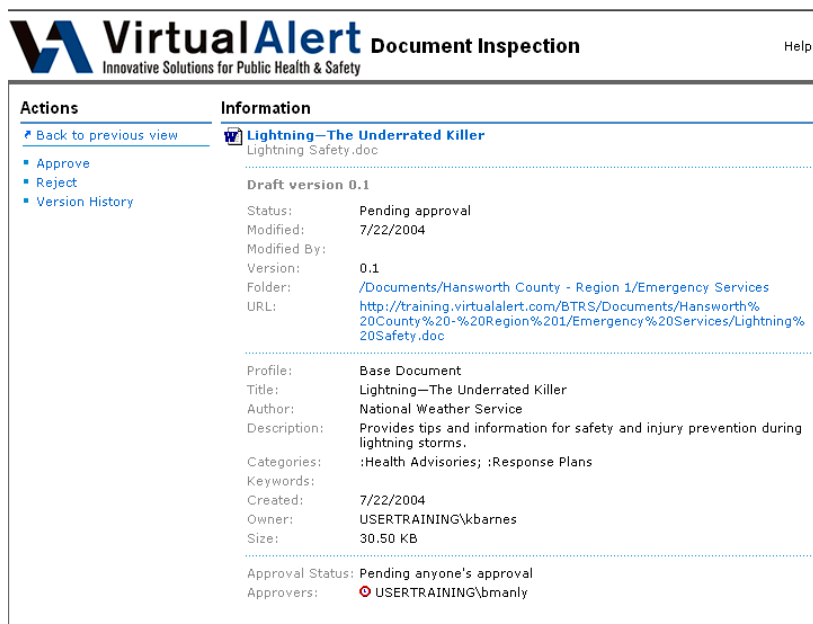
Approving Documents

When you review a document waiting for approval and make the decision to publish it, you can approve it for publication on the portal.

► To approve a document for publication


- 1 On the BTRS home page, under the name of the document waiting to be approved, click **Approve/Reject**.

The *Document Inspection* screen appears.



VirtualAlert Document Inspection
Innovative Solutions for Public Health & Safety

Help

Actions	Information
Back to previous view Approve Reject Version History	<p>Lightning—The Underrated Killer Lightning Safety.doc</p> <p>Draft version 0.1</p> <p>Status: Pending approval Modified: 7/22/2004 Modified By: 0.1 Version: 0.1 Folder: /Documents/Hansworth County - Region 1/Emergency Services URL: http://training.virtualalert.com/BTRS/Documents/Hansworth%20County%20-%20Region%201/Emergency%20Services/Lightning%20Safety.doc</p> <p>Profile: Base Document Title: Lightning—The Underrated Killer Author: National Weather Service Description: Provides tips and information for safety and injury prevention during lightning storms. Categories: :Health Advisories; :Response Plans Keywords: Created: 7/22/2004 Owner: USERTRAINING\kbarnes Size: 30.50 KB</p> <p>Approval Status: Pending anyone's approval Approvers:  USERTRAINING\kbarnes</p>

2 Under Actions, click **Approve**.

BTRS displays the message, “Are you sure you want to approve this document?”

3 Click **OK**.

If you are the final (or only) approver for the document, the *Document Inspection* screen updates to reflect the published document.

— or —

If the document requires additional approval, at the bottom of the screen, the Approval Status and names of the document approvers displays.

In either case, the document no longer appears in the *Awaiting Your Approval* section of the BTRS home page.

Rejecting Documents

If you review a document waiting for approval and make the decision not to publish it, you can reject the document.

When you reject a document, regardless of how many approvers are designated, the approval process is canceled. The document displays in the Document Library as checked in until the author attempts to publish the document again; at that time, the document must go through the approval process again.

► **To reject a document for publication**

- 1 On the BTRS home page, under the name of the document waiting to be approved, click **Approve/Reject**.

The *Document Inspection* screen appears.

- 2 Under Actions, click **Reject**.

BTRS displays the message, “Are you sure you want to reject this document?”

- 3 Click **OK**.

The *Document Inspection* screen updates to reflect the document as checked in. The document no longer appears in the *Awaiting Your Approval* or *Pending Approval* sections of the BTRS home page.

Editing Documents

After a document has been checked in or published, you can make changes to the document’s content or to its profile as needed. To make changes to a document’s content, you can check out the document, work on the file on your computer, and then check in or publish the updated document. You can also collaborate with other users to discuss a document online. In addition, you can change both the name of the document file and the document’s title.



To make any changes to the document or its profile, you must be assigned author or admin permissions for the folder in which the document is stored.

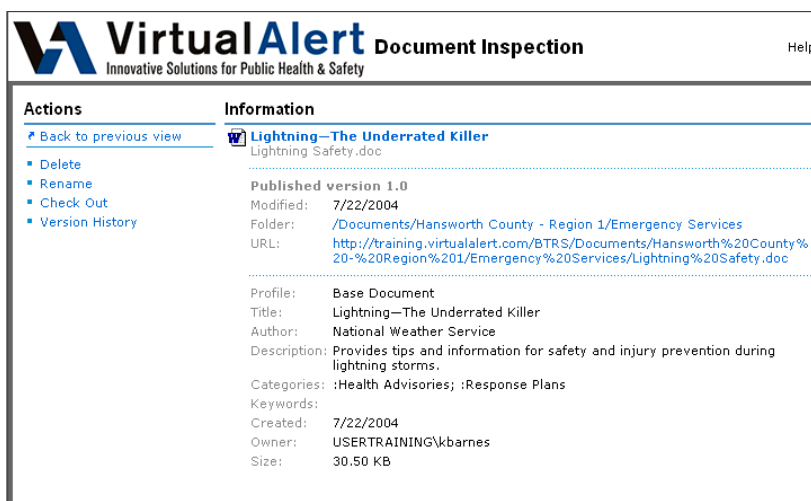
Checking Out Documents

When you need to make updates to a document already posted on the BTRS portal, you can check the document out. Checking out a document allows only that user to make changes. While other users may still view the previous version of the document, only the user who has checked out the document can save changes to the BTRS portal.

► **To check out a document**

- 1 In the Document Library, open the folder that contains the document you want to check out.
- 2 Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.



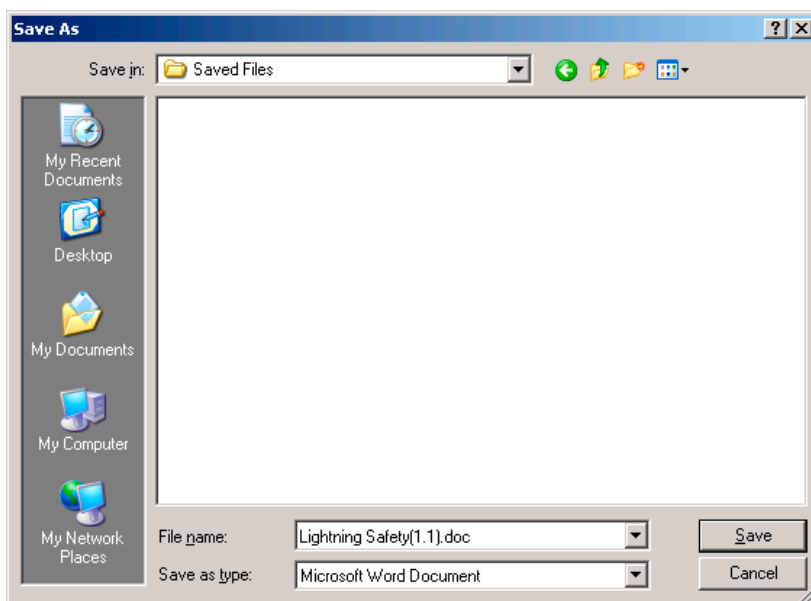
- 3 Under Actions, click **Check Out**.

The *Check a document out* screen appears.

- 4 Right-click the name of the document and click **Save Target As**.

You may see similar options instead, such as *Save As* or *Save*.

The *Save As* dialog box opens.



- 5 Locate the folder in which you want to save the file, and click **Save**.

By default, BTRS includes the version number of document in the file name to assist in tracking the document's version history.

- 6 When the file download is complete, in the *Download Complete* dialog box, click **Open** to view the document.

— or —

Click **Close** to close the *Download Complete* dialog box.

Editing Document Profiles

When you check in or publish a document, you can include document profile information, including the name of the document and author, as well as assign category, description, subject, and/or keyword information to make the document easily searchable.



To make changes to a document's profile after it is posted, you must either check the document out and back in, or republish the document, to access the *Document Profile* screen.

Use the steps in the following sections to edit a document's profile:

To edit the document profile by:	Follow these steps:
Checking out, then checking in the document	<ul style="list-style-type: none"> • "Checking Out Documents" on page 63 • "Checking In Documents" on page 54
Checking out, then publishing the document	<ul style="list-style-type: none"> • "Checking Out Documents" on page 63 • "Publishing Documents" on page 58



If your organization manages document profiles in Microsoft® Word, Excel, PowerPoint, etc., you can check the document out, make the document properties changes in the original application, and then resubmit your document, as the information in the document properties automatically populates the **Title**, **Author**, **Description**, and **Keywords** fields.

Renaming Documents

If you have permission to do so, you can change the name of the document file after it has been checked in or published.



This process does not cover changing the **title of the document** (such as "2004 Schedule of EMT Required Training Courses"), but rather the **name of the file** (such as "2004 class schedule.doc"). For more information about changing the title of a document, see the previous section, "Editing Document Profiles" on page 65.

► **To rename a document**

- 1 In the Document Library, open the folder that contains the file you want to rename.
- 2 Under the name of the document, click **Show Actions**.
The *Document Inspection* screen appears.
- 3 Under Actions, click **Rename**.
The *Rename a document* screen appears.
- 4 In the **Enter a new name for this document** field, change the file name.
- 5 Click **Save**.
The *Document Inspection* screen appears and displays the updated file name.

Discussing Documents

Using Web discussions, you can post online comments about a document without modifying it. Instead of using e-mail to discuss or capture feedback for a document, authors and reviewers can communicate with each other through Web discussions on the portal. Even if another user has checked out the document, you can post comments or work with others to provide feedback that other reviewers or the author can use in making changes to the document. BTRS stores comments as threaded conversations, showing comments and replies together for easy review.

The discussion threads you create for a document remain with the document until you clear them, even if you rename, check in/out, or republish the document. Discussions are removed, however, if the folder containing the document is renamed. For more information, see “Renaming Folders” on page 49.

When you have a document open for discussion, you can also choose which elements of a comment to view, as well as which comments you want to see.



If you are using Microsoft® Office XP, make sure your computer is properly configured before using this feature. If you are unsure about your computer's configuration, check with your BTRS administrator before continuing.

Adding Discussion Comments to a Document

The Discussions feature in BTRS enables you to both efficiently work with other users as well as track others' comments on a document checked in or published to the BTRS portal. When you post a document, users with permission to view your document can open the document, add discussion comments, and respond to others' comments quickly, without modifying the document itself.

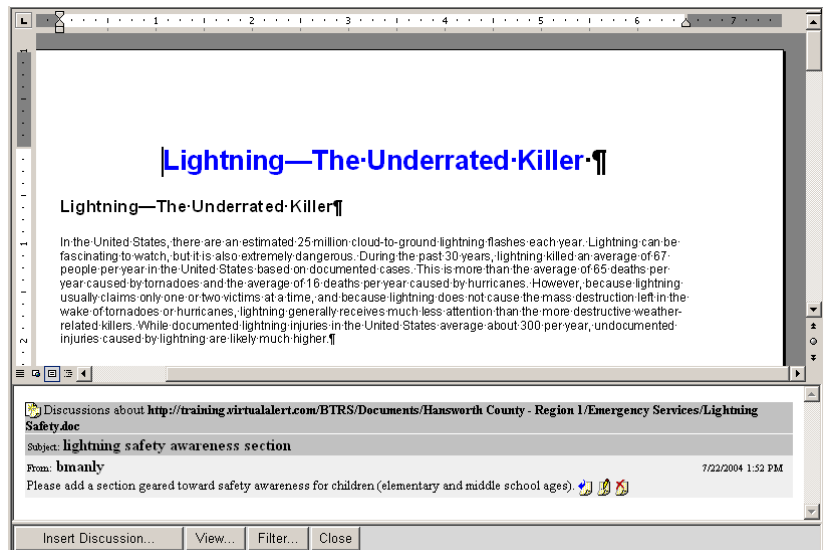
► **To add discussion comments to a document**

- 1 In the Document Library, open the folder that contains the document you want to discuss.
- 2 Under the name of the file, click **Discuss**.

The document opens in a new window, and displays the Discussions pane at the bottom of the window.

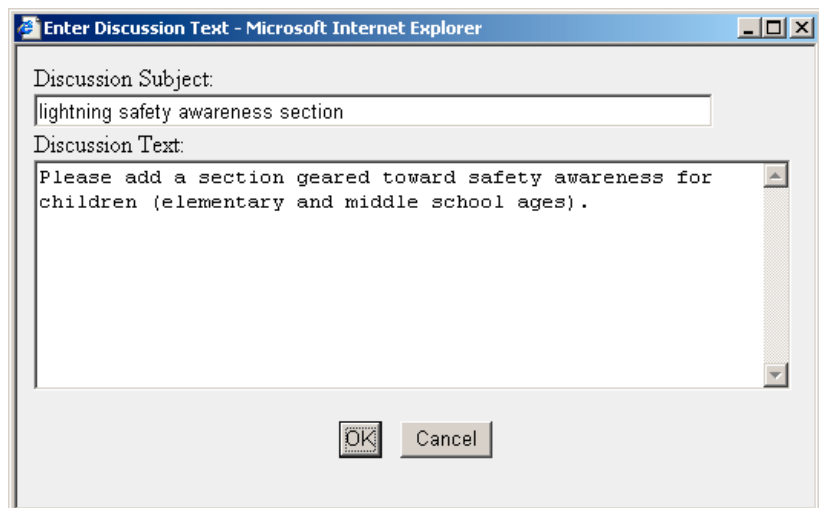


Depending on the applications you have installed on your computer, you may be prompted to either open or save the file to your computer before continuing. Click **Open** to display the document in the *Discussions* window.



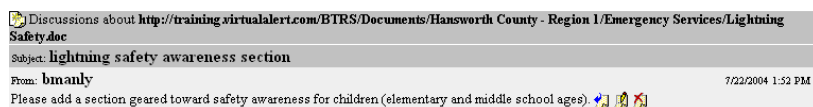
- 3 In the Discussion pane, click **Insert Discussion**.

The *Enter Discussion Text* dialog box opens.



- 4 In the **Discussion Subject** field, type a brief subject for this comment. This text appears in bold in the Discussion pane.
- 5 In the **Discussion Text** field, type the text of your comment.
- 6 Click **OK**.


The *Enter Discussion Text* dialog box closes. The message subject, text, author name, and date and time appear in the Discussion pane.



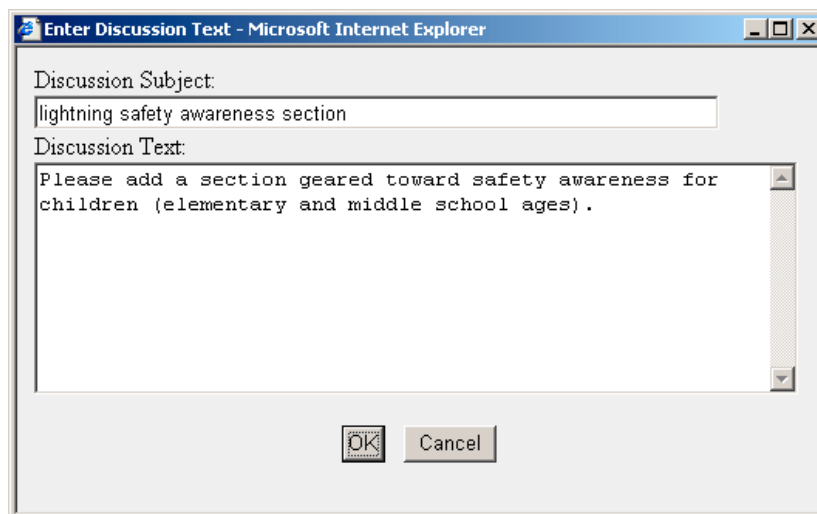
Editing Existing Discussion Comments

After posting a discussion comment, you can change the subject and/or text of your comment without deleting and retyping the comment.

► To edit a discussion comment

- 1 With the document you are discussing open, in the Discussion pane, locate the comment you want to edit.
- 2 To the right of the discussion text, click .

The *Enter Discussion Text* dialog box opens.




- 3 Make any changes to your discussion subject or text, and click **OK**. The *Enter Discussion Text* dialog box closes. The changes are made and the discussion comment is updated.

Replying to Existing Discussion Comments

If another user posts a discussion comment or question that you need to reply to, you can add a reply within the discussion thread to record and track progress made.

► To reply to a discussion comment

- 1 With the document you are discussing open, in the Discussion pane, locate the comment to which you want to reply.
- 2 To the right of the discussion text, click .
- The *Enter Discussion Text* dialog box opens.
- 3 In the **Discussion Subject** field, type a brief subject for this comment. This text appears in bold in the Discussion pane.
- 4 In the **Discussion Text** field, type the content of your comment.
- 5 Click **OK**.

The reply message subject, text, author name, and date and time appear indented under the original comment (or, if one or more replies have been posted, the last reply) in the Discussion pane.


Deleting Discussion Comments

When a discussion comment has been closed or you no longer need to track it, you can remove it from the discussion thread.



Deleting a comment does not remove all replies to that comment; each comment and reply must be deleted separately.

► To delete a discussion comment

- 1 With the document you are discussing open, in the Discussion pane, locate the comment you want to delete.
- 2 To the right of the discussion text, click .
- BTRS displays the message, “Are you sure you want to delete this entry?”
- 3 Click **OK**.

The comment is removed from the discussion thread. All subsequent entries move up in the Discussions pane.

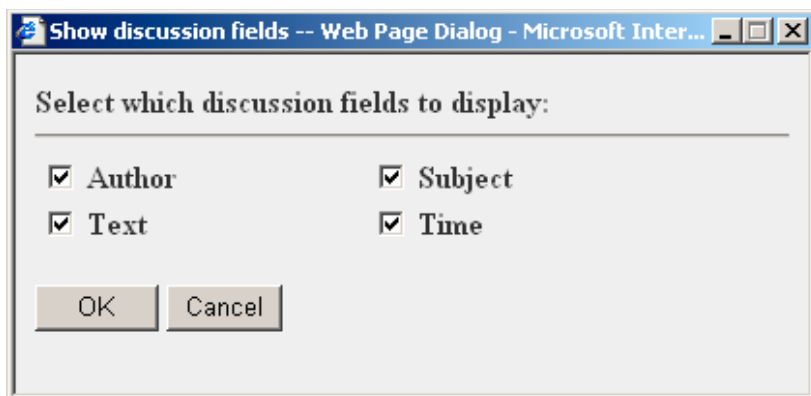
Customizing and Filtering Discussion Comments

For each document you discuss, you can customize how the discussion thread appears. You can choose to view the comment’s author, subject, text, and/or date and time. You can also filter discussion comments by author or when the comment was posted.

► **To customize the appearance of discussion comments**

- 1 With the document you are discussing open, in the Discussion pane, click **View**.

The *Show discussion fields* dialog box opens.



- 2 Select one or more of the following check boxes: **Author**, **Subject**, **Text**, or **Time**.

Clearing the check box removes the item from the comment display.

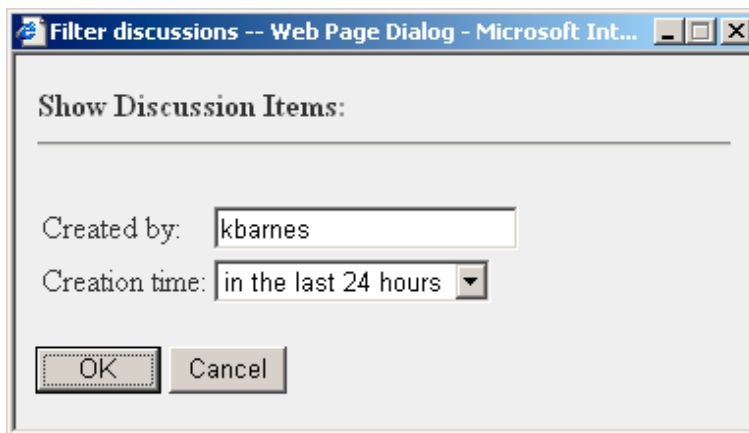
- 3 Click **OK**.

The *Show discussion fields* dialog box closes. The options you selected display in the discussion comments for the document.

► **To filter discussion comments**

- 1 With the document you are discussing open, in the Discussion pane, click **Filter**.

The *Filter discussions* dialog box opens.



- 2 In the **Created by** field, type the name of the author as it appears in the discussion thread.

You may skip this step if you want only to search by when the comment was posted.

- 3 In the **Creation time** list, select the range of dates you want to be displayed in the discussion thread.

You may skip this step if you want only to search by who posted the comment.

- 4 Click **OK**.

Matching discussion comments are displayed in the Discussion pane.

Subscribing to Documents

For more information about clearing subscription notifications or deleting subscriptions to documents, see “Working with Subscriptions” in Chapter 2, page 25.

If you need to track changes to a particular document, you can subscribe to that document and be notified when changes are made and the document is republished. To create a document subscription, follow the steps in “Creating Subscriptions” in Chapter 2, page 26.

Subscription notifications appear on the BTRS portal home page. In addition, you can also request that notification be sent to your e-mail address; you have the option to receive e-mail notifications as changes occur, or to receive daily or weekly notifications.

Faxing Documents

BTRS enables you to send faxes directly from the portal to other BTRS users in your HAN. You can fax Microsoft Word (.doc) documents, Microsoft PowerPoint (.ppt) presentations, rich text (.rtf) files, and standard text (.txt) files. After you send a fax, you can review the current status of the fax, and search for and view other documents you have faxed.

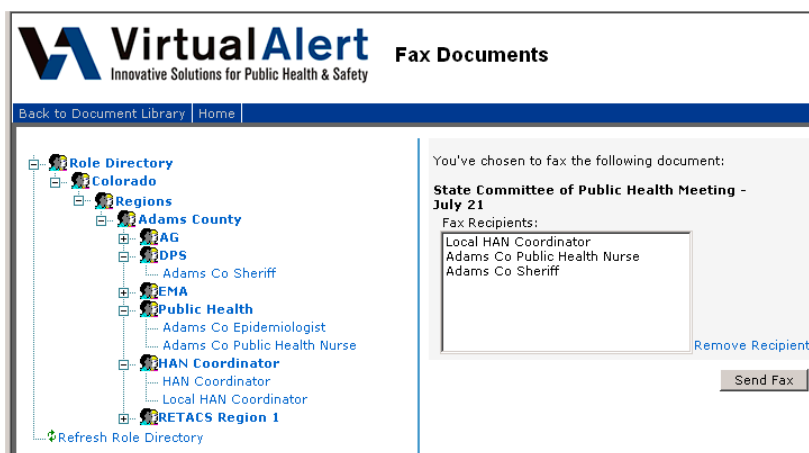
You can send faxes to any role or role group that you have permission to alert. For more information about alertable roles, see “Understanding Alertable Roles” in Chapter 5, page 86.

► To fax a document

- 1 In the Document Library, open the folder than contains the document you want to fax.
- 2 Under the name of the document, click **Fax**.

This option does not appear if the document cannot be faxed.

The *Fax Documents* screen appears.



- 3 In the left pane, expand the tree to locate and select the roles to which you want to fax the document.



To select all the roles within a particular OU, right-click the name of the OU and click **Select All Roles in OU**. To select all of the roles that reside within a particular OU and all sub-OU's, right-click the name of the OU and click **Select All Roles in OU and Sub OUs**.

In the right pane, the role names appear in the **Fax Recipients** list as you select them.

- 4 Click **Send Fax**.

BTRS displays the message, "Are you sure you want to send this fax?"

- 5 Click **OK**.

The *Generating Fax* screen displays while the fax is being sent. When the process is complete, the *Fax Confirmation* screen appears, displaying the name of each user who is scheduled to receive the fax, and the current status of the fax.

Fax Confirmation

The following fax has been sent:

Document Title: Chemical Emergencies: How to Keep Your Family Safe
Document Url: http://yoursite.gov/btrs/Documents/Chemical_Emergencies.doc

Roles Activated: [View Roles Notified](#)
(2 roles resulting in 2 users)

Sending Fax To:

Contact	Type	Location	Status	Reason	Attempts	Time Stamp
Jill Weatherby	Fax	(916) 640-1476	Pending	Added to queue	0	2/17/2005 9:40:04 AM
Alex Guerrero	Fax	(916) 640-1473	Pending	Added to queue	0	2/17/2005 9:40:04 AM

Ok

Viewing Sent Faxes

The *My Sent Faxes* screen enables you to search for specific documents you have faxed either to a particular role, during a specified date range, or both.

► To search for sent faxes

- 1 In the Document Library, in any folder, click **View My Sent Faxes**.

The *My Sent Faxes* screen appears.

Search Criteria

Sent on or after date: mm/dd/yyyy

Sent before date: mm/dd/yyyy

Role sent to:

My Sent Faxes

Help with this form

Use this form to view all of the faxes you've sent and the current status of those faxes. You can filter results by selecting a specific date range as well as by selecting a specific Role. Choose [Select All](#) to return all Roles you've faxed. Click on the time the fax was sent to view detailed information including what Roles it was sent to.

Found 2 records

▼ Date/Time Sent	Document Title
1/23/2005 8:47:15 AM	Bioterrorism Preparedness Brochure
2/17/2005 9:40:04 AM	Chemical Emergencies: How to Keep Your Family Safe

To view all the faxes you have sent, leave all fields blank, then click **Search**.

- 2 In the **Sent on or after date** field, type or select the date on or after which you sent the fax.

Click the calendar icon next to the field to view and select from dates on the calendar.

- 3 In the **Sent before date** field type or select the date on or before you sent the fax.

Click the calendar icon next to the field to view and select from dates on the calendar.

- 4 In the **Role sent to** list, select the role or role group to which you faxed the document.

Only those roles and role groups you have permission to alert appear in the list.

Choosing the **Select All** option display faxes sent to all roles and role groups you have permission to alert.

- 5 Click **Search**.

BTRS returns a list of faxes that meet your criteria.

► To view sent fax information

- 1 After performing the previous steps in “To search for sent faxes,” on the *My Sent Faxes* screen, click the date and time link of the fax for which you want to see more information.

The *Fax Details* screen displays.

Fax Details[Back to Previous View](#)

Time Sent: 2/17/2005 9:51:13 AM
From: Dennis Hubbman
Title: **Chemical Emergencies: How to Keep Your Family Safe**
Document Url: [http://yoursite.gov/btrs/Documents/Chemical Emergencies.doc](http://yoursite.gov/btrs/Documents/Chemical_Emergencies.doc)
Status: Pending

Roles Activated: ☒ [View Roles Notified](#)
 (1 roles resulting in 1 users)

Faxed Contacts: (1)

Contact	Type	Location	Status	Reason	Attempts	Time Stamp
Jill Weatherby	Fax	(916) 640-1473	Sent	Message delivered.	1	2/17/2005 9:51:14 AM

2 Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to the <i>My Sent Faxes</i> screen
Document Url link	View the document you faxed
View Roles Notified	View the list of all roles and/or roles groups who are scheduled to receive the faxed document

Deleting Documents

If you have permission to do so, you can delete documents you no longer need to post or share with other users on the portal. You must be assigned author or admin permissions for that folder to delete the file.

You can delete a document through its folder in the Document Library section, through the Categories section of the portal, or from the search results list on the *Search* screen. Deleting the document from the Categories section or the *Search* screen also removes it from its host folder in the Document Library. If you want to remove a category from the document profile without deleting the file completely, check out the document instead and assign new category information to the document. For more information, see “Checking In Documents” on page 54.



Take care in selecting documents to be deleted, as documents cannot be recovered. If you are unsure about deleting a particular document, check out and save a copy of the document on your computer first.

► To delete a document

- 1 In the Document Library, Category section, or in the search results list, locate the document you want to delete.

This option does not display if you do not have permission to delete the document.

- 2 Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

- 3 Under Actions, click **Delete**.

BTRS displays the message, “Are you sure you want to delete this document?”

- 4 Click **OK**.

The document is removed from its host folder as well as any category folders.

5

Using the Alerting System

The alerting feature in BTRS provides a powerful and efficient method to inform one or more roles and/or role groups in your HAN of important events in your area. Alert messages can be sent to users' e-mail addresses, phones, fax numbers, and alpha pagers.

Receiving and confirming alerts is simple and takes only a few moments to do. You can choose how you are alerted so that you don't miss out on any critical information. In addition, you can quickly send messages to one or more roles and/or role groups to notify users throughout your HAN.



If you have an Alerting level license, you can receive, but not send or cancel, alerts. As such, when you log in to BTRS, you will not see the Alerts section described in this chapter, although you can confirm and view alerts just as other users do.

Viewing Active Alerts

For more information about setting and modifying your alerting profile, see "Using Alerting Profiles" in Chapter 3, page 38.

When an alert is sent to the users in your role, you can be contacted in one of three methods:

- Through the devices you specify in your active alerting profile
- Through your work fax only
- Through your work e-mail only

In addition, the alert is always posted on the BTRS portal for the duration of the alert, even if you have already confirmed receipt of the alert.

When sending an alert to other users, you can also view the status of communication with those users to determine who the alert was sent to, what devices the alert has been sent to, and if each user has confirmed receiving the alert.

Viewing Active Alerts on the BTRS Home Page

The BTRS home page displays all active alerts sent to your role by another user (or by you, if you have sent an alert to your own role). All alerts remain on the BTRS home page for the duration of the alert, which is established by the user sending the alert, even if you have already confirmed the alert through any device (phone, e-mail, portal, etc.). In addition, you can view the alert's priority, the name of the user who sent the alert, and the subject of the alert.

By default, alerts appear in the order sent to you. To sort the alerts in ascending order by sender or subject, click the column once. To sort the results in descending order, click the column again. An arrow appears next to the column's title to indicate the order in which the alerts are sorted.

▼ Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

Viewing Active Alert Details

From the BTRS home page, you can view additional information about an alert by clicking the date and time link in the **Alert Time** column. Doing so displays the *Alert Details* page.

The *Alert Details* page displays detailed information about the alert, including the time the alert was sent, the time the alert will expire, the name of the alert sender, the text of the alert message, the alert's status, and the roles and/or role groups notified.

► To view the details of an alert you received

- 1 On the BTRS home page, in the **Alert Time** column, click the date and time link of the alert for which you want to view details.

The *Alert Details* screen appears.

- 2 Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to <i>View My Sent Alerts</i> screen
Refresh Alert Details	Update the status of alert currently being sent to users
Confirm Receipt of Alert	Confirm that you have received the alert
View Roles Notified	Display the list of each role and/or role group you sent the alert to

Viewing Alerts You Have Sent

At any time after you send an alert, you can review the list of users who received your alert, and search for alerts by the role you sent the alert to, or by using a specific time range. You can also view the details of each alert.



If necessary, you can also use the *My Sent Alerts* screen to cancel an alert in progress. For more information about canceling alerts, see “Canceling Alerts” on page 87.

► To view sent alerts

- 1 On the BTRS navigation bar, click **Alerts**.

The *Alerts* screen appears.

- 2 Under Alerts Menu, click **View My Sent Alerts**.

– or –

From the *Alert Confirmation* screen, on the **Alerts** submenu, click **View My Sent Alerts**.

The *My Sent Alerts* screen appears.

VirtualAlert My Sent Alerts
Innovative Solutions for Public Health & Safety

Alerts Menu | Home

Search Criteria

Sent on or after date: mm/dd/yyyy

Sent before date: mm/dd/yyyy

Role sent to: [Select All](#)

My Sent Alerts
Help with this form
Use this form to view all of the alerts you've sent and the current status of those alerts. You can filter results by selecting a specific date range as well as by selecting a specific Role. Choose [Select All](#) to return all Roles you've alerted. Click on the time the alert was sent to view detailed information including confirmations and what Roles it was sent to.

Found 2 records

Action	Date/Time Sent	Expiration	Subject	Priority
Cancel	8/24/2004 8:28:17 PM	8/27/2004 3:28:17 PM	Ecoli cases at Sisters of Mercy Hospital	High
Cancel	8/24/2004 2:27:22 PM	8/24/2004 4:27:22 PM	Chemical Exposure in Littlefield	High

powered by
VirtualAlert
BTRS 3.0

To view all the alerts you have sent, leave all fields blank, then click **Search**.

- 3 In the **Sent on or after date** field, type or select the date on or after which you sent the alert.

Click the calendar icon next to the field to view and select from dates on the calendar.

- 4 In the **Sent before date** field, type or select the date before which you sent the alert.

Click the calendar icon next to the field to view and select from dates on the calendar.



The date you enter in this field is not included in the search.

- 5 In the **Role sent to** list, select the role or role group to which you sent the alert.

Only those roles and role groups you have permission to alert appear in the list. Choosing the **Select All** option generates a list of alerts you have sent to all roles and role groups.

- 6 Click **Search**.

BTRS returns a list of alerts that meet your criteria.

► To view sent alert details

- 1 After performing the previous steps in “To view sent alerts” click the date and time link of the alert for which you want to see more information.

The *Alert Details* page displays.

Alert Details

[Back to Previous View](#) [Refresh Alert Details](#) [Confirm Receipt of Alert](#)

Investigation Results

Medium

Time Sent: 8/24/2004 1:43:23 PM
 Expires: 8/24/2004 2:43:23 PM
 From: Chris Edwards
 Message: Investigation results for the 4/27 ecoli case are available for review in the Ecoli Workgroup folder.
 Status: Pending
 Confirmed: 20% (1/5)
 Roles Activated: [View Roles Notified](#)
 Hamilton County Public Health Staff
 (1 roles resulting in 5 users)

Sending Alerts To:

Confirmed: (1)

Contact	Type	Location	Status	Reason	Attempts	Time Stamp
Harriet Oldenburg	Email	oldenburg@ca.gov	In Progress	Waiting for confirmation	1	8/24/2004 1:43:23 PM
Phone (649) 610-1600 x3014			Confirmed	Message received	1	8/24/2004 1:44:04 PM
Phone (649) 549-3487			Canceled	Confirmed via alternate location	0	8/24/2004 1:44:04 PM

Users Unconfirmed: (4)

Contact	Type	Location	Status	Reason	Attempts	Time Stamp
Chris Edwards	Email	edwards@fdh.org	In Progress	Waiting for confirmation	1	8/24/2004 1:43:23 PM
Georgette Rankin	Email	rankinge@doh.gov	In Progress	Waiting for confirmation	1	8/24/2004 1:43:23 PM
Brenda Starks	Email	bstarks@us.gov	In Progress	Waiting for confirmation	1	8/24/2004 1:43:23 PM
Allan Wochenski	Email	woch_allan@cdc.gov	In Progress	Waiting for confirmation	1	8/24/2004 1:43:23 PM

- 2 Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to <i>View My Sent Alerts</i> screen
Refresh Alert Details	Update the status of alert currently being sent to users
Confirm Receipt of Alert	Confirm that you have received the alert
View Roles Notified	Display the list of each role and/or role group you sent the alert to

To sort the search results, click the column's title. To view alerts on subsequent pages, click the page number above or below the search results.

Confirming Receipt of Alerts

For more information about creating and activating alerting profiles, "Using Alerting Profiles" in Chapter 3, page 38.

You can confirm alerts sent to you through one of several methods: email, telephone, or the BTRS portal, depending on which devices you include in your active alerting profile. Notifications are sent to each device based on the order you select in your alerting profile, or in the case of a Work Fax or Work Email Only alert, only to your designated fax number or e-mail address. After you confirm receipt of the alert, any other scheduled notifications are discontinued.

In addition, the alert sender can view the progress of the alert, including both the details of which devices your alert was sent to, as well as the time and method of your confirmation.



To verify that you have confirmed receipt of an alert, click the alert link either on the BTRS home page or on the *Alerts* screen to display the *Alert Details* screen. If the **Confirm Receipt of This Alert** link displays at the top of the screen, you have not yet confirmed the alert.

Confirming Alerts through the BTRS Portal

You can choose to confirm an alert through the BTRS portal in one of two ways – either on the BTRS home page, or from the *Alerts* screen.

► To confirm receipt of an alert on the BTRS home page

- 1 On the BTRS home page, click the alert you want to confirm.

The *Alert Details* screen appears.

Alert Details

[Back to Previous View](#)

[Confirm Receipt of Alert](#)



Investigation Results
Medium

Time Sent: 8/24/2004 1:43:23 PM
Expires: 8/24/2004 2:43:23 PM
From: Chris Edwards
Message: Investigation results for the 4/27 ecoli case are available for review in the Ecoli Workgroup folder.
Status: Pending

Roles Activated: [View Roles Notified](#)
(1 roles)

- 2 At the top of the screen, click **Confirm Receipt of Alert**.

The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the screen.

► **To confirm receipt of an alert on the Alert Details screen**

- 1 On the BTRS navigation bar, click **Alerts**.
The *Alerts* screen appears.
- 2 Under Active Alerts, in the **Alert Time** column, click the date and time link of the alert you want to confirm.
The *Alert Details* screen appears.
- 3 At the top of the screen, click **Confirm Receipt of Alert**.
The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the screen.

Confirming Alerts via Telephone

If you elect to have an alert sent to any standard telephone or cellular phone, you can confirm receipt of the alert through your phone without logging in to BTRS.



If a Work Fax or Work Email Only alert is sent to you, you will not receive telephone calls, even if you have entered phone numbers in your alerting profile.

► **To confirm an alert via the phone**

- 1 Upon answering your phone, listen to the automated greeting.
- 2 Press any key on your phone to continue.
- 3 When prompted, enter the four-digit security code you created as your alerting security code.
- 4 After successfully entering your code, listen to the alert message.

– or –

If you are unable to enter your code, or if you enter an incorrect code, the prompt repeats.

After three unsuccessful entries, BTRS disconnects.

- 5 When you have listened to the entire alert message, press **1** on your phone to confirm the alert, or **2** to repeat the message.

For more information about setting and changing your alerting security code, see “Using Alerting Security Codes” in Chapter 3, page 36.

Confirming Alerts via E-mail

If you elect to have an alert sent to your e-mail address, you can confirm the alert via the e-mail message.

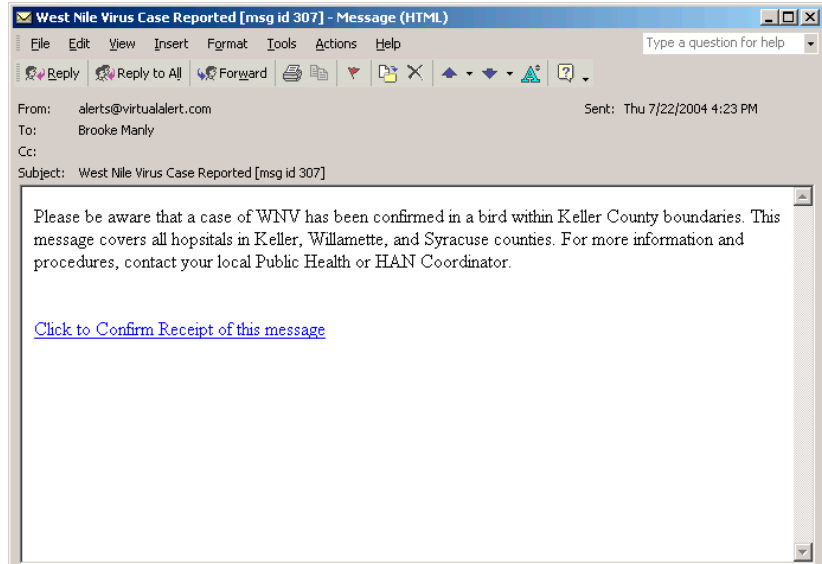


If a Work Fax Only alert is sent to you, you will not receive an e-mail, even if you have entered e-mail addresses in your alerting profile.

► **To confirm an alert via e-mail**

- 1 Upon opening the e-mail message, review the alert message in the e-mail.

The e-mail displays the subject and message of the alert. To view the name of the alert sender, you need to review the information on the BTRS home page or on the *Alerts* screen.



- 2 At the end of the alert message, click the **Click to Confirm Receipt of this message** link.

If you are not currently logged in to your BTRS portal, you are prompted to log in to BTRS.

After you successfully log on, BTRS displays the message, “Alert confirmed as received.”

Sending Alerts

Alerts are sent to each device based on the locations users select in their alerting profiles. Each location is notified in the order chosen by the user (Location 1, Location 2, etc.). For more information about creating and activating alerting profiles, see “Using Alerting Profiles” in Chapter 3, page 38.

Using BTRS, you can quickly inform other BTRS users of important occurrences in your HAN. BTRS enables you to choose how long to keep the alert active, the priority of the alert, and which roles and/or role groups to notify. The roles and role groups that you can send alerts to are called “alertable roles” and appear in the directory tree. For more information about alertable roles, see “Understanding Alertable Roles” on page 86.


When you send alerts, each user is notified according to the type of alert you select, including by alerting profiles, by fax only, or by work e-mail only. If you choose to send an alert according to each user’s alerting profile, each user receives alerts on the devices he or she selects in his or her active alerting profile. If you select the Fax Only or Work Email Only options, the alert is sent only to the work fax or e-mail address in each user’s profile.



Only those users with BTRS Admin and BTRS Collaborator licenses can send alerts.

► **To send an alert**

- 1 On the BTRS navigation bar, click **Alerts**.
The *Alerts* screen appears.
- 2 Under Alerts Menu, click **Send New Alert**.
The *Send New Alert* screen appears.



Send New Alert

Innovative Solutions for Public Health & Safety

Alerts Menu ▾
Home

Role Directory

- Hamilton County Dept of Emergency Services
 - Hamilton County First Responders
- Hamilton County Dept of Public Health
 - Hamilton County Public Health Staff
- Washburn County Dept of Public Health
 - Washburn County Epidemiologist
 - Washburn County PH Investigators
 - Washburn County Public Health Director
 - Washburn County Public Health Staff

Refresh

Priority

Duration:
 Days: Hours: default

Alert Type:

Alert Recipients:

Washburn County Epidemiologist
Washburn County PH Investigators
Washburn County Public Health Director
Washburn County Public Health Staff
Hamilton County Public Health Staff

Remove Recipient

Subject:

Message:

Please be aware that a case of WNV has been confirmed in a bird within Washburn County boundaries. The pending investigation will cover all PH roles within Washburn and Hamilton counties. For more information and procedures, contact your local PH or HAN Coordinator.

You may select as many roles and or role groups as you wish. In the right pane, roles and role groups you select appear in the **Alert Recipients** list.

- 3 In the left pane, in the tree, do one or more of the following:

To do this	Do this
Select individual roles and/or role groups	Click each role and/or role group to which you want to send the alert
Select all roles within an OU	Right-click the OU that contains the roles you want to include in the alert, and click Select All Roles in OU
Select all roles within an OU and all sub-OUTs	Right-click the OU that contains the sub-OUTs and roles you want to include in the alert, and click Select All Roles in OU and Sub OUTs

Only the roles and role groups you have permission to alert appear in the tree.

You may select as many roles and role groups as you wish. In the right pane, roles and role groups you select appear in the **Alert Recipients** list.



To verify which users are assigned to a particular role or which roles are assigned to a particular role group, right-click the name of the role or role group, and click **View Role Members**.

- 4 In the right pane, in the **Priority** list, select **Low**, **Medium**, or **High**.

- 5 In the **Duration** list, select **1 Hour**, **1 Day**, or **1 Week**.

– or –

To select a different range of time, click **custom**, and select the number of days and/or hours you want the alert to remain active.

- 6 In the **Alert Type** list, select one of the following methods:

Select this	To do this
Use Alert Profiles	Send an alert to each user based on his or her active alerting profile
Fax Only Alert	Send an alert to each user's designated work fax number
Work Email Only Alert	Send an alert to each user's work e-mail address

- 7 In the **Subject** field, type the subject or title of your alert.

Regardless of the method you choose, the alert appears on the BTRS home page of each user who received the alert.

- 8 In the **Message** field, type the alert message.

You can enter up to 2,000 characters.

- 9 Click **SEND ALERT**.

BTRS displays the message, “Are you sure you want to send this alert?”

- 10 Click **OK**.

The *Generating Alert* screen displays while the alert information is being produced.

When the process is complete, the *Alert Confirmation* screen appears, and displays the information for each user the was sent to. The users appear in the list alphabetically by last name.

Understanding Alertable Roles

By default, the roles and role groups you are assigned to do not have permission to send alerts to any roles or role groups. Permissions to send alerts must be assigned by BTRS administrators. If you have permission to send an alert to a particular role or role group, that role or role group name appears in the directory tree on the *Send New Alert* screen; otherwise, the role/role group does not appear in the tree.



If you do not see a role or role group in the directory tree that you need to alert, contact your BTRS administrator.



Directory tree displaying alertable roles (Send New Alert screen)

Canceling Alerts

If you inadvertently send an alert to the wrong role or with incorrect text, you can cancel your alert through the *My Sent Alerts* screen. Although all e-mail alerts are sent immediately and cannot be undone, you may prevent some phone alerts from being issued.



If you have administrative privileges and are able to manage the alert sender's role, you can cancel an alert sent by another user from the *Alert History Log* screen. For more information, see the *Administrator Guide*.

► To cancel an alert

- 1 On the *Alerts* screen, under Alerts Menu, click **View My Sent Alerts**.

– or –

From the *Alert Confirmation* screen, on the **Alerts** submenu, click **View My Sent Alerts**.

The *My Sent Alerts* screen appears.

- 2 In the **Role sent to** list, choose **Select All**.

You may also enter additional search criteria, but to save time in this process, skip these information fields.

- 3 Click **Search**.

A list of all alerts you have sent displays on the bottom half of the screen, with the most recently sent alert at the top of the list.

- 4 In the **Action** column for the alert you want to cancel, click **Cancel**.

BTRS displays the message, “Are you sure you want to cancel this alert? All outgoing phone calls will be stopped. Some phone calls and all email messages have already been delivered and cannot be repealed.”

- 5 Click **OK**.

BTRS displays the message, “Alert successfully canceled!” as well as the subject of your alert and your name as the sender.

Click **OK** to return to the *My Sent Alerts* screen.

6 Using My Directory

The Directory section of the BTRS portal enables you to view, search for, and export other BTRS users' contact information. Because each BTRS user must update the information in his or her profile at least every 30 days, you can rely on the fact that the contact data in the directory is up-to-date. You can use this information to e-mail items that BTRS does not, or to update your organization's contact database in other applications, such as Microsoft® Excel and Outlook®.

Depending on which data other users enter about themselves, you may be able to view the following information about each user:

- Name
- Title
- Organization name
- Type of industry user works in
- What languages the user speaks
- Roles the user is assigned to
- Contact information:
 - E-mail address
 - Work phone number
 - Cell phone number
 - Pager number
 - Fax number
 - Alternate phone number
 - Satellite phone number
 - Alpha pager number
 - Alternate e-mail address




If the user you are viewing has not been assigned to a role that you are able to alert, you will only see that user's e-mail address, work phone number, and work fax number. All other information in that user's profile appears as **(private)**.

In addition to viewing user information through the directory tree view, you can also search for individual users' contact information, and copy directory information into other applications.

Using the Directory Tree View

For more information about what roles and OUs are, see "Roles, Role Groups, and Organizational Units" in Chapter 2, page 10.

The directory tree organizes user information by each role and Organizational Unit (OU) created in your BTRS portal. The name of each OU appears in bold, with an icon () to the left. All roles appear in the tree as links; clicking the link displays each user in that role and the associated contact information.

► To view users in the Directory Tree

- 1 On the BTRS navigation bar, click **Directory**.

The *My Directory* screen appears.

- 2 In the left pane, on the Directory Tree tab, expand the tree to locate the role for which you want to view user information.

You can also search for users. For more information, see "Searching for Users in the Directory" on page 90.

- 3 Click the link for any role to display contact information in the right pane.

Searching for Users in the Directory

In addition to viewing users in the directory tree by role, you can search for individual users using other criteria, including the user's name, the company he or she works for, or the city in which he or she works. For example, you can perform a search to look for all users who work in Los Angeles, or whose title is HAN Coordinator.



Search results only display information entered by other users that you have permission to view.

► To search for users in the directory

- 1 On the BTRS navigation bar, click **Directory**.

The *My Directory* screen appears.



- 2 In the left pane, click the **Search** tab.

- 3 In the **Field** list, select one of the following:

Select this option	To search by
Name	The user's name
Title	The user's job title
Organization	The name of the organization the user works for
Business Category	The category of business the user selected in his or her profile
Prof. License	A professional license the user holds
Specialty	The specialty the user selected in his or her profile
Spoken Languages	A language the user speaks

Select this option	To search by
Work Location	The user's job location
Work City	The city in which the user works

- 4 Based on the selection you made in step 3, in the **Criteria** list, select one of the following:

Select this option	To search for
Contains	Words that contain the letter, word, or phrase you enter in the Text field
Equals	Words that appear exactly as you enter in the Text field
Begins with	Words that begin with the letter or letters you enter in the Text field
Ends with	Words that end with the letter or letters you enter in the Text field

- 5 Based on the selection you made in step 3, in the **Text** field, type the letter, letters, word, or phrase you want BTRS to search for in the directory.

- 6 Click **search**.

The results of your search display in the right pane.

To view more of the right pane, place your cursor on the scroll bar between the left and right panes, then click and drag the scroll bar to the left.

VirtualAlert Directory
Innovative Solutions for Public Health & Safety

Home | Search | Categories | Document Library | Subscriptions | Alerts | **Directory** | My Profile | BTRS Admin | Logoff

Directory View | Search | (1 Users returned)

* denotes alertable roles.

Name	Title	Organization	Bus. Category	Languages Spoken	Roles	Contact Information
Frank DePalma	Sheriff	Adams County Sheriff	Public Health	-	Adams Co Sheriff*	Email Address: depalma@dle.co.us Work Phone: (302) 451-1600 x301 Fax: (302) 451-1601

Exporting Directory Information

After performing a search or locating users within a role, you can quickly create a Microsoft® Excel spreadsheet or a table in Microsoft® Word that contains all user information displayed on the screen.

► To copy user information to a spreadsheet

- 1 On the *Directory* screen, select all the text you want to insert into the spreadsheet.

You can quickly select all text on the screen by pressing **CTRL + A**.

- 2 Right-click the selected text, and click **Copy** (or press **CTRL + C**).
- 3 Open a new or existing document in Microsoft® Excel or Word.
- 4 Place your cursor at the location in the spreadsheet or document where you want to insert user information.
- 5 On the **Edit** menu, click **Paste** (or press **CTRL + V**).

The text from the *Directory* screen appears in the document or spreadsheet.

Glossary

A

active alerts Alerts that have been sent and have not yet expired based on set.

alert A notification sent to inform or warn roles within the BTRS directory.

alert details All details of a sent alert, including the alert's sender, subject, message, priority, send time, expiration, and roles notified.

alertable roles A role designated by a BTRS Administrator to receive alerts from a particular role or role group.

application One or more programs in applications software that you can run on your computer. Some examples of applications are database programs (Microsoft® Access), word processors (Microsoft® Word), and spreadsheets (Microsoft® Excel).

approve The process of accepting a draft version of a document as ready for publishing in the Document Library. Only those users designated to be approvers for a specific folder can approve documents. See also **reject**.

Author A user who has permission to add, edit, delete, or read all documents in a folder. Authors can also create, rename, and delete folders, but cannot set folder security policies. In an enhanced folder, Authors can also submit any document for publishing.

B

Back button In Microsoft® Internet Explorer, a button on the Standard Buttons toolbar that enables you to return to the page you were previously viewing. Not all pages enable you to use the Back button.

browser A software application used to locate and display Web pages. To use BTRS, you need to use Microsoft® Internet Explorer's browser. Most browsers can display both text and graphics, as well as sound and video.

BTRS Admin A BTRS user with broader permissions to manage portal content and settings, as well as roles, role groups, and users. In addition, BTRS Admins can generate and view various administrative reports and logs.

C

categories Groups of related content, organized hierarchically by subject matter.

check in Add or return a draft version of a document to an enhanced folder. Allows users with Author and BTRS Admin permissions to view, edit, and check out the document. See also **check out**, **enhanced folder**, **publish**.

check out Create a writable version of a document while preventing other users from editing the same document. See also **check in**, **enhanced folder**.

D

dashboard A page on a dashboard site. Each dashboard contains a collection of Web parts in a modular view that can be presented to users in a Web browser. See also **dashboard site**, **Web part**.

dashboard site A Web site created by using digital dashboard technology. The dashboard site contains a number of pages, or dashboards. The dashboard site is used to distribute information to workspace users through a Web browser. See also **digital dashboard**, **Web Part**.

digital dashboard See **dashboard**.

directory The collection of Organizational Units (OUs) and the roles within those OUs, displayed in a tree format. See also **tree**.

discussions A feature for adding threaded remarks about a document.

document A discrete unit of content and its associated metadata. See also **file**.

Document Library The storage location for documents in BTRS. See also **document folder**.

document profile A set of properties applied to a document, such as the document's author, description, title, and in BTRS, category and keywords.

document folder A folder used to store documents in the workspace.

E

enhanced folder A document storage folder that supports document management tasks such as check in/out, version history, approval, and publishing. See also **standard folder**.

F

folder A means of organizing and storing files and documents in the Document Library.

form See **screen**.

K

keywords A list of words assigned to a document or file that represents terms a user might use in a search form. Often keywords represent topics, categories discussed in the document.

M

maximize When using a window, to enlarge the size of the window (usually so that it covers the entire screen). See also **minimize**.

metadata The properties associated with a document. Metadata can be system-defined, such as file size or modified date, or user-defined, such as author or title.

minimize When using a window, to reduce the size of and replace the window with an icon on your task bar. Minimizing retains the information displayed in the window while allowing you to view other windows. Clicking the icon on the task bar restores the window to its previous size and position. See also **maximize**.

My Profile Information contained in BTRS about an individual user that includes work, home, and alternate contact information. The information can be updated at any time by that user, or by a BTRS administrator.

N

navigation bar A series of links on each page in BTRS that enable you to view another section of BTRS, such as My Profile, Directory, and Alerts.

O

Organizational Unit (OU) A container that holds objects. Typically, an organization creates OUs that resemble the organizational structure, maintaining an OU for each department or region.

P

page A document on the World Wide Web that displays all the content assigned to that page, such as the BTRS home page or Alerts page. See also **screen**.

permission Levels of authorization within the portal that determine access to documents/sections in the workspace. The three permission levels in the Document Library are Reader, Author, and BTRS Admin.

profile (portal) Information about individual users and documents that are uploaded into BTRS. The profile information is attached to the corresponding documents and aids in searches. See also **My Profile**.

property An element of metadata for a document profile. Each document profile has multiple properties. Properties can be system-defined, such as file size or creation date, or can be user-defined, such as title or keywords. See also **metadata**.

publish To make a document available to all users with permission to view the document, including Readers. See also **approve**, **check in**.

R

Reader A user who can search for and read documents but cannot add them to the workspace. By default, all folder users have Reader permissions. In an enhanced folder, Readers can only view folders and published versions of documents. A Reader cannot check out, edit, or delete workspace documents, nor view draft

document versions.

reject The process of not accepting a draft version of a document as ready for publishing in the Document Library. Only those users designated to be approvers for a specific folder can reject documents. See also **approve**.

roles A title within an Organizational Unit (OU) that reflects one or more users. In BTRS, roles play an important part of security and access to areas of the portal.

role group One or more roles grouped together for the purposes of assigning alertable roles, folder permissions, or management rights. See also **alertable roles**, **roles**.

S

scope The range and depth of a search on the dashboard site. For example, when searching for the term “fiscal reports”, you can narrow the scope of your search to a particular category such as “Earnings”. See also **depth**.

screen In BTRS, a Web page that serves to perform a particular function, such as sending an alert, entering document profiles, or generating a report. See also **page**.

search The functionality of finding information in documents based on keywords found in the text of those documents or related to the properties of the documents. This is commonly referred to as full-text search.

standard folder A document storage folder that enables you to create document profiles, but does not support document check in/out, publishing, or version history. See also **enhanced folder**.

subscription A request for notification when changes are made to a document, the contents of a folder, a category, or a search results list.

T

tree A method of organizing Organizational Units (OUs), roles, role groups, and/or users in which the groups appear similar to that of the branches of a tree. Clicking the items in the tree expands or collapses the information stored with that branch.

U

undo check out Cancel the check-out of a document. Undoing a check out returns the document to the state it was before the check out. See also **check out**.

V

version history The (reverse) chronological listing of revisions that have been made to an item, and any associated comments attached to the version by the user performing the check-in or check-out.

version label A number or other text that indicates the version of an item.

W

Web browser See **browser**.

Web page See **page**.

Web part A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework. See also **dashboard site**, **digital dashboard**.

window An enclosed, rectangular area that displays on your monitor screen that runs a program or displays data. You can have several windows open at one time; most allow to you to resize, move, maximize, and minimize the window. See also minimize, maximize and application.

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